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ABSTRACT

This document contains the papers from a conference on current research in vocational education and training (VET) and human resource development in Europe. The following papers are among those included: "The Contribution of the German Pilot Project 'New Learning Concepts within the Dual Vocational Education and Training System' towards the Development of Work Process Related and Competence-Based Curricula" (Waldemar Bauer, Karin Przygodda); "Accreditation of Experiential Learning in France" (M'Hamed Dif); "Two Work Cultures--Two Learning Environments" (Eva Ellstrom, Bodil Ekholm); "Organizational Learning and Knowledge Sharing" (Martin Fischer, Peter Roben); "The French APEL System Rationale and Philosophy" (Benedicte Gendron); "Learning Entrepreneurs" (Patricia M. Gielen, Aimee Hoeve, Loek F.M. Nieuwenhuis); "Learning and Work Experience" (Toni Griffiths, David Guile); "First Results from a Comparative Study of the Professional Reality of Vocational Teachers" (Philipp Grollmann); "Professionals as Flexible Workers or Portfolio People" (Graham Guest); "A Theory of Informal Learning at Work" (John Halliday, Paul Hager); "Gender-Specific Key Qualifications for Working Life" (Gerald Heidegger, Anke S. Kampmeier, Beatrix Niemeyer); "Learning Organization in a Pre-accession Country" (Palmira Juceviciene);

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"Challenges for Research in Vocational Higher Education" (Antii Kauppi, Seppo Peisa, Liisa Torvinen, Hannu Valkama); "Competence and Learning in Late Career." (Leif Chr. Lahn); "Internationalization of Vocational Education" (Johanna Lasonen); "Flexibility within Vocational Education and Training in Sweden" (Mats Lindell); "Vocational Identity and Working Conditions in the Sector of Tourism" (Fernando Marhuenda); "Methodological Debates in Research on Vocational Identities" (Fernando Marhuenda); "Engage to Learn" (Beatrix Niemeyer, Sue Cranmer, Inka Neunaber, Eeva Laamminpaa); "European Perspectives on Organisational Innovation and Learning" (Barry Nyhan, Peter Cressey, Massimo Tomassini, Michael Kelleher, Rob Poell); "Evaluation and Training Schemes for the Hard-to-Place" (Francesca Salva Mut, Miquel F. Oliver Trobat, Antonio Casero Martinez, Maria Agnes Melia Barcelo, Joan Nadal Cavaller); "Overcoming Barriers to Employment for Women" (Jan Shepherd, Sue Saxby-Smith); "Educational Motivation among Adult Students over 40" (Marja-Leena Stenstrom); "Mentoring in Undergraduate Business Management Programmes" (Jim Stewart, Vanessa Knowles); and "Integrating Work and Learning in Organizations" (Jonathan Winterton). Most papers contain substantial bibliographies. (MN)

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Vocational Education
and Training Research
VETNET

VETNET ECER 2002 Proceedings

Current research in European vocational education and human resouce development

Editors: Sabine Manning, Toni Griffiths & Teresa Oliveira

Research Forum WIFO
Berlin

Programme

VETNET Roundtable

Proceedings of the programme presented by the research network on vocational education and training (VETNET) at the European Conference of Educational Research (ECER) in Lisbon, 11-14 September 2002

2062

VETNET Chair: Toni Griffiths
Programme Chair: Teresa Oliveira

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the sector of tourism: Today VET students, workers of tomorrow.

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- [A] [P] **Salvà Mut, Francesca; Oliver Trobat, Miquel F.; Casero Martínez, Antonio; Melià Barceló, Maria Agnès; Nadal Cavaller, Joan**. Evaluation training schemes for the hard-to-place.
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- [A] [P] **Stewart, Jim; Knowles, Vanessa**. Mentoring in undergraduate business management programmes.
- [A] [P] **Winterton, Jonathan**. Integrating work and learning in organisations.

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The contribution of the German pilot project 'New Learning Concepts within the Dual Vocational Education and Training System' towards the development of work process related and competence-based curricula

Abstract

In 1997, a new curricular framework for VET-schools called 'learning fields' was implemented in Germany. As a result vocational curricula with their elements and contents should be related to work and business processes and described on the basis of competences. Regarding the German tradition of curricula a paradigm shift can be observed, because earlier curricula were organised according to a discipline structure. 1998 a pilot project programme was launched focussing on 'new learning concepts…'. A lot of the involved projects were constructing 'learning fields' and implemented these in VET schools. They developed concepts for the empirical analysis of work processes or tasks and identified required competences as a basis for curricula, intending to link qualification research with curriculum development in this way. Analysing the different approaches it is obvious that an integrated concept regarding the analysis of work and the transformation of the empirical results into curricula is necessary. This also implies a model of competence development, because the focus of this kind of VET research is finally teaching and learning practices in VET schools. Research in this perspective can only be executed domain specific, because it has to deal with the contents and forms of expertise in an occupational field and therefore with the in-depth structure of knowledge and skills.

1 Introduction

Since 1998 pilot projects have been clustered in form of programmes concentrating on a specific topic. The first pilot project programme was called 'New learning concepts within the dual vocational education and training.' [1] The overall objective of the programme was to develop new learning concepts within the dual VET system, and ultimately to increase the effectiveness and quality of learning in this way. [2]

Generally spoken, the new quality of the programme has the following characteristics:

- Promoting innovation in a new programme structure. This means that several schools in different federal states work on the same theme, which improves the transfer and dissemination of best practice examples.
- Dealing with the whole context of learning processes in the VET system including occupational analysis and identification of competences, curriculum development, fostering institutional structures of VET schools, the didactical design of (complex) learning situation, the evaluation of learning processes, the use of multi-media learning arrangements and the role of teachers.
- Paradigm shift from a discipline-organised curricula and teaching in VET schools towards a work-process-related and competence-based curricula and design of learning processes.

At the same time the policy makers in the VET area implemented a new curricular framework for the VET schools in Germany (KMK 1996). We call it 'learning fields'. [3] 'Learning fields' are didactically reflected occupational fields and are following the international tendency of competence-based and work-related curricula. This new curricular framework had a great influence upon the programme and determined the further work of the projects. The majority of the pilot projects were focusing upon developing and implementing 'learning fields' as an expression of the new learning concepts.

The transformation process from significant work processes to the learning situations implies some complex steps. This process should start from analysing work activities and the required competences, followed by the development of work-process-related and competence-based curricula and finally ends in the design of work-process-related learning situations.

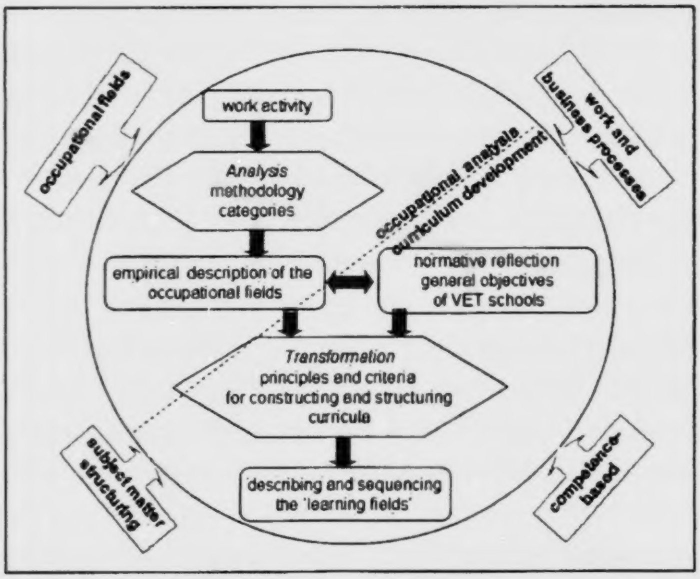
About one third of the pilot projects elaborated more or less systematic and precise concepts for analysing work processes and working tasks as well as models for the development of competences. The crucial intention of all approaches is the identification of the contents and forms of work activity and competence as an empirical basis for the curriculum development and its impacts for learning processes. In this way, the researchers were trying to close the transformation gap between the empirical analysis of work and the rather normative construction of curricula. The very specific concepts and research methods in some projects also contribute to the development of methodology in VET research. In this paper we describe the concepts of selected pilot projects focusing on the concepts of research methods for work and competence analysis and the models for developing curricula according to the new 'learning fields'.

2 The new curriculum framework 'learning fields' in Germany [4]

The key purpose of 'learning fields' is to link the curricula and ultimately the learning processes to the work activity and to promote at the same time action learning at the curricular level. Action learning in VET schools has to be holistic, situated, contextualized and should support making experiences. Therefore, the reference for the learning process via 'learning fields' is related to a complete work activity with its typical characteristic of self-directed planning, execution and evaluation of the action and also regarding interdisciplinary aspects (e.g. technology, economics, ecology, law, etc.). As a result, the challenge for curriculum developers and VET teachers is to identify occupational situations which are significant for the work activity and also have a potential for learning.

The manual for the new curricular framework basically mentions four criteria for the development of 'learning fields'. They should be derived form occupational fields which basically represent the area of working. They should be related to the work and business processes which shows the process character of working (and learning). They should be described competence based. Finally, the 'learning fields' and their contents should been structured in a 'logic of subject matter'. [5] Figure 1 shows the reference points in the manual for developing 'learning fields' and its implications:

Figure 1: Reference points of the 'learning fields' and its implication



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To summarise, the curricular framework implies three problems:

- Analysis problem: How can the occupational fields and the working and business processes be analysed focussed on developing curricula? Therefore, a methodological concept with adequate methods and categories is necessary to describe work activities.
- Transformation problem: How can the empirical results be transformed into curricula regarding the question of competence development? The transformation process must be conceptualised by educational, pedagogical and psychological criteria. Curricula always express specific generic purposes of a society and contain normative objectives which must be taken into account.
- Systematisation problem: How can the elements ('learning fields') and the contents of the curricular elements be arranged to support competence development? This implies that a competence model is required, because this basically describes an adequate way of learning.

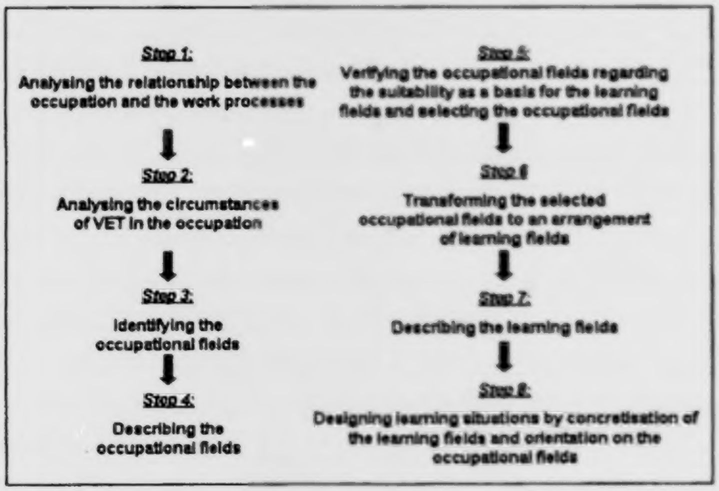
3 Selected approaches and concepts of curriculum development in the programme

The manual for the curricular framework does not give an answer to these overall questions. The following pilot projects developed and tested concepts and models within this research field. Regarding the methodological discussion, it is important to notice that they did not develop new research methods but contextualised typical methods from the social sciences within the German VET research.

Pilot Project SELUBA/NELE

The two pilot projects NELE and SELUBA developed a manual together for constructing 'learning fields' (Müller/Zöller 2001). The concept's basis is the 'theoretical-pragmatic approach for constructing learning fields in technical vocational areas' (Bader 2001) in eight curricular steps.

Figure 2: The eight curricular steps for constructing 'learning fields' and learning situations [6]


Step 1:
Analysing the relationship between the occupation and the work processes
Step 2:
Analysing the circumstances of VET in the occupation
Step 3:
Identifying the occupational fields
Step 4:
Describing the occupational fields
Step 5:
Verifying the occupational fields regarding the suitability as a basis for the learning fields and selecting the occupational fields
Step 6
Transforming the selected occupational fields to an arrangement of learning fields
Step 7:
Describing the learning fields
Step 8:
Designing learning situations by concretisation of the learning fields and orientation on the occupational fields

The manual starts with the analysis of the relation between a vocational occupation, the work processes and the VET conditions. Based on this analysis the occupational fields can be identified and described. After validating and reflecting these occupational fields, the 'learning fields' are derived and described. Finally, learning situations should be developed out of the 'learning fields' including a reflection upon the occupational fields.

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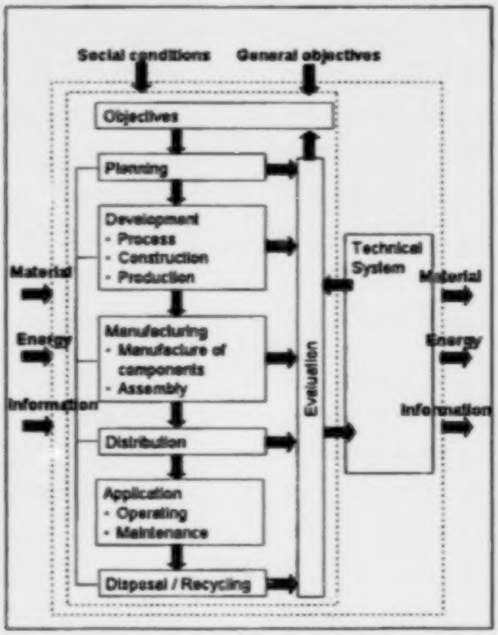
An Occupational field in this concept is defined as 'a complex task that contains significant situations for the occupation, life and the society.' The ability to cope with these occupational situations is the general goal for VET (ibid., p. 26). The important criteria for selecting the 'learning fields' derived form the occupational fields which are the general objectives of VET schools and the significance for the present, future and its exemplarity (Klafki 1996).

The reference system for gathering and structuring the work processes in this approach is the socio-technical action system.

Figure 3: The socio-technical action system



The socio-technical action system represents the thinking and acting of human beings in technical occupational fields which is based upon scientific and technological concepts. NELE/SELUBA supposes that the occupational fields and work processes should be identified in this system. But the project manual does not explain where exactly the work processes can be found, for example, in the vertical process or in the horizontal function unit. Furthermore, modern structure and organisation of work do not follow this classical organisational concept anymore. Unfortunately, the manual does not mention precise methods for the empirical analysis of work processes. It only gives some suggestions like analysing curricula, visiting companies or interviewing experts.

The development of competences in this concept is defined as the process of acquiring skills, abilities and knowledge up to the level of theoretical profound, autonomous and responsible understanding and shaping of technology. It is assumed that this process begins from the every day experience, followed by the workplace experience, the model forming and finally ends with the forming of theory. Thus, it is supposed that theoretical knowledge is the centre of expertise of skilled worker that can explain or solve everything in the work life. For selecting and sequencing the occupational fields and also the learning fields a reflection with respect to the theoretical foundation is proposed, but no systematisation is offered.

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Pilot Project BS 2000

The above described concept was adopted and applied in the pilot project BS 2000 for the electrical fitter and the power electronics mechanic. For this purpose the eight curricular steps were combined to four steps. The methodological approach started with the analysis of existing curricula and occupational profiles for these occupations. A matrix containing a list of common working tasks and areas of application was derived by the document analysis. In the next step, this matrix was evaluated by expert workers. The verification identified 13 dominant working tasks, form which finally 12 learning fields were derived by a reflection of the researcher (Malek 2002). As a result of the used concept the working tasks and the 'learning fields' have a very discipline-oriented structure (table I). They are referring to typical learning areas of electrical engineering or technology. They were arranged in the curriculum by the technological way of energy, this means from the generation of energy via the distribution and transmission of energy and finally the use of energy in certain plants or devices. Hence, the necessity of a subject matter structure is interpreted as a technological way.

Pilot Project GAB

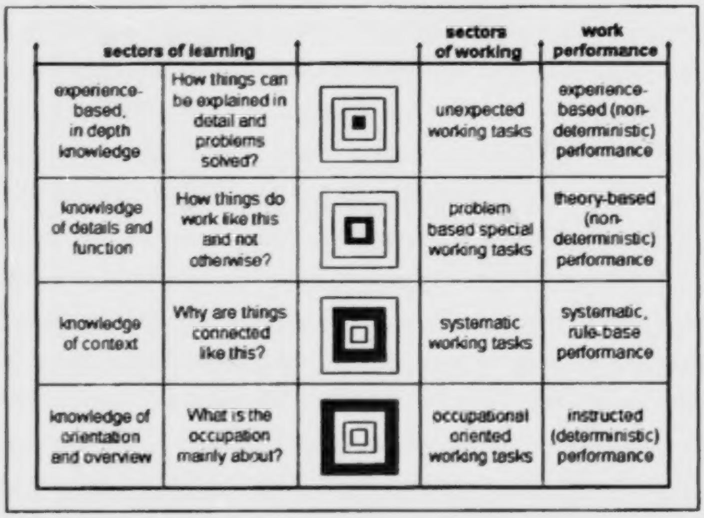
GAB has a very integrated and detailed concept. [7] GAB assumes that every occupation can be empirically described by a defined number of core tasks of the trade. Core tasks describe the specific occupation on the basis of associations between different aspects of the work and characteristic tasks that are typical of the occupation and also provide a complete picture of it. With this clarification, core tasks cannot be described as a single ability or job, but rather in the sense of a complete action that exemplifies all aspects of the occupation. A general description of how a core task is carried out contains the specifics of the concrete task, its planning and execution as well as the assessment and evaluation of the resulting work (Kleiner et al 2002).

These core tasks of the trade have different levels. There are working tasks which can be carried out as a novice or more complex one, which only an expert can manage. In this understanding GAB supposes that there must be an empirically describable way for the competence development. This is done by the stages of vocational development, which also illustrate the integration of the core tasks of the trade into the work process and business process of the company where they describe the process in the neighbouring technical departments. The work organisation and the existing design possibilities are integrated in the representation of the stages of vocational development as well as assessing the future importance of the workstation. In this perspective, the challenge was to identify these developmental tasks (Havighurst 1972).

GAB uses a method-triangulation approach for identifying these core tasks. The first and the most important step is the identification and description of the core tasks itself and the stages of development in so called expert-workers workshops (Kleiner et al 2002). [8] The expert-worker workshops are a mixture of different methods of the social science, like expert interviews, group discussion and narrative interviews. GAB is using three categories for the description of the core tasks, which are 'the artefacts of the occupation', 'the tools, methods and organisation of the occupation' and 'the requirements of the occupation'. They also use these categories for describing the contents of work and learning in the 'learning fields' (figure 5). The GAB research approach is domain-specific, because the contents and forms of work and expertise can only be analysed by a researcher who is an expert of the domain, too. As a consequence this also means to analyse the tacit knowledge of the expert workers. The identified and precisely described core tasks were finally verified by workplace studies in companies and evaluated by other experts of the domain in a national wide survey.

The main characteristic of GAB is the linkage of the method of the empirical analysis of work with a competence model. This model is based upon the novice-expert-paradigm of Dreyfus/Dreyfus (1986) and the assumption that competence is acquired by the successful performance of a task. [9] Thus, GAB has developed a reference system in order to identify core tasks and arrange according to the 'logic of development'. Therefore, GAB uses a macro-structure derived from the novice-expert-paradigm with four knowledge and competence levels (Rauner 1999).

Figure 4: Macro-structure for the systematization of core tasks



sectors of learning			sectors of working	work performance
experience-based, in depth knowledge	How things can be explained in detail and problems solved?		unexpected working tasks	experience-based (non-deterministic) performance
knowledge of details and function	How things do work like this and not otherwise?		problem based special working tasks	theory-based (non-deterministic) performance
knowledge of context	Why are things connected like this?		systematic working tasks	systematic, rule-base performance
knowledge of orientation and overview	What is the occupation mainly about?		occupational oriented working tasks	instructed (deterministic) performance

GAB identified with this concept the core tasks for six industrial occupations which describe the occupation and organised them according to their competence model. From this analytic point to the construction of competence-based and work-related curricula is a very short step.

Figure 5 shows an example of a 'learning field' for the industrial mechanic (Rauner & Kleiner & Meyer 2001).

Figure 5: 'Learning field' for the industrial mechanic – an example of GAB [10]

<table>
<tr><td>Learning field 9
Learning level 3</td><td colspan="2">Starting up and shutting down of a production line</td><td>Duration
Company 12 w.
VET-school 7 h</td></tr>
<tr><td colspan="4">A production line has to be started up and shut down for testing the functionality after setting a machine, a changeover, a new construction or trouble shooting. In this work process the failures or quality defects must be analysed and removed. The worker has to protocol arising problems for further optimizing the production line. The working tasks has to be carried out in collaboration with the operator of the production line in order to use the production line specific knowledge and experience of the operator</td></tr>
<tr><td colspan="4">Educational and Training objectives within companies and schools</td></tr>
<tr><td colspan="2">Company
The apprentices provide information of the reason for the machine shutdown and the necessary measurements for the initial operation. They prepare the starting up of the production line with respect to the job safety and the regulations for environmental protection. They control the functionality and the quality of the manufactured products. They elaborate a technical documentation. They solve failures and defects self-reliantly or charge the specialised workshop with the repair.
The apprentices carry out the shut down of the production line and take precaution for it.</td><td colspan="2">VET-school
The apprentices plan and verify the procedure for starting up and shutting down the production line with respect to the regulations for operation, safety and security. They verify the significance of the plant or machine for the manufacturing process while defining the machine downtime and regard the specific conditions in the company. They plan the function control of the production line using defined criteria and control the first manufactured components resp. tools using testing instruments after the start up of the machine. They have to protocol arising failures and solve them self-reliantly.
The apprentices develop strategies for analysing the control of a technical system and differentiate several modes of operation. They provide information and use technical documentations. They read and elaborate technical documentations about the function and procedure of technical systems and its control using general producer information and safety regulations.</td></tr>
<tr><td colspan="4">Contents of work and learning</td></tr>
<tr><td>Artefacts
• Preparation of the initial operation
• Starting-up a machine or plant
• Planning the machine shutdown
• Testing the functionality of a machine or plant
• Quality control of the products</td><td colspan="2">Tools
• Technical documentations, e.g. company instructions, working regulations, layout diagrams
• Failure and acceptance protocol
• Control of the machine and operating tools
• PLC-technology
• Testing tools
• Standard or special tools
Methods
• Analysing technical systems
• Describing constructional and functional units
• Provision of technical information
• Testing the machine conditions
• Investigating company data
• Elaborating the function and control of plants and machines
• Mounting and dismantling technical units
• Controlling the functionality
• Using methods of quality control
• Documenting failures
Organisation
• Planning the machine shutdown
• Starting up and shutting down the production line by the operator or maintenance worker
• Commission of other experts in the case of residual failures</td><td>Requirements
• Competent starting up and shutting down the production line
• Initial operation of the machine or plant according to the producer specification
• Providing the functionality of the machine or plant
• Quality control of the products
• Investigating the machine shutdown according to the company requirements
• Provision and analysing of technical information
• Competent and appropriate documentation of the machine condition
• Controlling occupational safety and health and machine protection
• Observing regulations for environmental protection</td></tr>
</table>

Pilot Project BQ 2000

BQ 2000 also developed a detailed concept for work process analysis and also a model for the complete occupational field as the basis for 'learning fields'. The structural element and analytic category within this concept is the work process. They describe the work processes with its elements, which are the customer order, the working environment, the working tasks, the worker, the work materials and finally the product. Analysing the complete work process focused on VET, the external influences from the society, the company and the customer on these elements has to be identified, too (Hägele/Knutzen 2001).

BQ 2000 developed a very complex methodological approach for analysing and describing work processes (figure 6).

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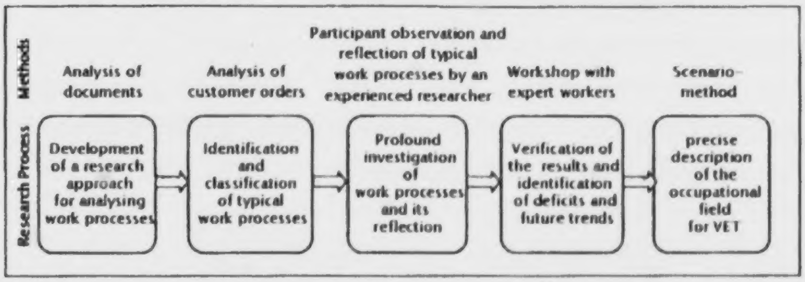
Figure 6: The methodological approach in BQ 2000


Methods
Research Process
Analysis of documents
Analysis of customer orders
Participant observation and reflection of typical work processes by an experienced researcher
Workshop with expert workers
Scenario-method
Development of a research approach for analysing work processes
Identification and classification of typical work processes
Profound investigation of work processes and its reflection
Verification of the results and identification of deficits and future trends
precise description of the occupational field for VET

The first step is a (rather) quantitative analysis of customer orders to identify typical work processes. [11] After the identification of a topology of work processes, the next step is the profound description of these processes. This is done by participant observation and narrative interviews with experts at workplaces. This step is important to understand the in-depth structure of the work activity and to identify the work process, its elements and procedures as well as the tools, materials and methods of working. This analysis can only be done by a researcher who is also an expert of the domain. The following precise description is done by similar categories like in GAB but with a higher reflection upon external influences within the categories society, company and customer. The verification of the clustered work processes finally is done in a separate workshop with other expert workers in order to evaluate the results and identify future economic or technological trends or developments. Some basic criteria for this research step are the exemplarity, the representativity and the straightforwardness of the identified and described work processes. Finally, the whole analytic process ends with a scenario method by which the complete occupational field is described using the above mentioned elements. Figure 6 shows an example for a work processes using a matrix with these categories (ibid.).

Figure 7: Matrix for describing a work process concerning the example 'installation of an emergency lighting system and its power supply'

structural conditions	society	Ecological, economic and social values, norms and legislation; Technical power supply; Risks and dangers of using energy; Significance of power supply in the industrial society	Technical connecting conditions and regulation; Detailed estimate; Federal support programmes; Competition conditions in the electrical small-scale business	Technical regulations; Occupational safety regulations; High-quality workmanship	High-quality workmanship; Security regulations; Safety measures
	company	Experience in the area of emergency lighting and power supply; Commitment to the environmental protection within the company; Willingness for the identification as a energy service worker	Specialisation and expansion of the in-plant working areas towards regenerative energy sources, energy management, building management service Profit orientation	Company planning of assignment; Tools and technical equipment	Customer orientation; Interest in further purchase orders
	customer	Safety and security requirements; Flexibility and efficiency of power supply; Conditions of the building; Value in use and expectation of utility	Financial conditions; Constructional conditions; Customer credits in the work	Constructional conditions; Customer oriented adaptation	Functionality; Safety and constructional integration of the electrical plant; Stability; Simplicity of service
work process steps		order acceptance	planning	executing	delivery of product
steps of activity		Identifying the problem; Customer advisory service; Planning of the customer specific emergency lighting and its power supply; Elaborating alternative solutions: conventional vs. prospective electrical installation including ecological and economical saving potential	Identifying the constructional conditions, the illumination, the technical connecting conditions, the cross-section of cables and the safety units; Choosing and dimensioning the distribution, the control units and the technical connecting conditions, problem solving Expressing generic needs of the worker for his work; Managing the legislative regulations	Identifying existing electrical installation and analysing circuits; Mounting the cables, the distribution device, the power supply, regenerative energy sources, overload protection units; Installation and initial operation of distribution devices for electrical energy, energy control and measurement	Function control; Electrical safety measurement; Computer-aided documentation of the work
materials and methods		Customer advisory service; Computer aided planning; Reference examples, catalogues, presentation, product information	Team work Talking to suppliers	Standard tools, multimeter, testing instruments, installation circuits ; Mounting command Installation materials; Protocol; Customer advisory service Discussion between employers and employees	Customer advisory service; Function test and safety measurement; Documentary report
overall vocational competence		Executing the steps of activity and handling the working materials of the work process; Reflecting, criticising and shaping the circumstances of the single work process steps; social and communicative competence; Knowledge of emergency lighting, power supply systems, energy distribution, types of electrical installation and its integration in an existing building, energy rates			

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BQ 2000 derived the 'learning fields' from this broad description of the occupational fields. For the systematisation they were using the same competence model like GAB, but did not link this competence model with the methodological approach. Thus, the transformation step is not very clear.

Pilot Projects KUBE and ERKUNDA

Also other pilot projects which originally did not intend to develop 'learning fields' at the beginning of the project executed an occupational analysis. The pilot projects ERKUNDA and KUBE were investigating work activities with regards to the influence of new technologies (ERKUNDA for building automation) and the increasing necessity of customer orientation and service competence in small-scale enterprises (KUBE in the plumber area). Both pilot projects did surveys with different target groups (entrepreneurs, producers, customers, workers and apprentices). Finally, the projects also developed some examples of 'learning fields' and learning situations concerning this special focus. In both approaches one can see two important aspects. Firstly, the results of the surveys did hardly influenced the design of curricula or learning situations, because they did not have a concept combing the occupational analysis and the development of curricula by taking into account the design of learning arrangement. The linkage between qualification research and curriculum development was therefore not realised. Secondly, because KUBE did not have a concept for organising the curricular elements, they sequenced them according to the product circle of heating systems and tried to integrate customer orientation.

4 Comparison of the concepts and the results

The following table summarises the concepts and results of the above described pilot projects:

Table I: Concepts and result of the pilot projects

Pilot project	NELE / SELUBA	BS 2000	GAB	BQ 2000	KUBE / ERKUNDA
Methods / Instruments	Manual for constructing 'learning fields' including analysis questions and methodological suggestions	Analysis of documents (occupational profiles and existing curricula); Interviews with experts; Classification of the identified working tasks	Workshops with expert-workers; Workplace studies; National wide survey with other experts in the domain	Analysis of customer orders; Participant observations; Workshops with experts; Scenario method	Surveying different target groups (skilled workers entrepreneurs, apprentices, producer, customer)
Results	Not yet applied and documented	Description of the working tasks; Development of 'learning fields' for The electrical fitter and power electronics mechanic	Identification and description of working tasks and learning fields for 6 occupations industrial mechanics, industrial electronics, tool mechanic, motor mechanic, mechatronics fitter, industrial clerk	Identification and full description of the work processes and the all-embracing occupational field for the electrical fitter	Description of working tasks regarding customer orientation for the electrical fitter and the plumber
Structuring	No specific concept for the curriculum structure	Technological structuring of the 'learning fields' according to the way of energy and electrical plants and devices	Competence-based and developmental logical structure of the 'learning fields' Sequencing the 'learning fields' by knowledge and competence levels	Competence-based and developmental logical structure of the 'learning fields'; Sequencing the 'learning fields' by knowledge and competence levels	Technological structuring of the 'learning fields' and ordering the learning situations according to the product circle of a heating system

The key purpose of the 'learning field' is the implementation of the work process related and competence-based curricula. The comparison shows that the pilot projects developed and tested different concepts. The common aspect in the concepts is the use of occupational/work analysis as an empirical basis for the development of curricula. Especially GAB and BQ 2000 developed a complete model for identifying, describing, selecting and structuring the working tasks or work processes based on empirical studies and a theoretical model. Both projects developed a very specific methodological approach and also defined categories and selection criteria for the analysis. The methods are similar in some parts, but are combined in different ways. Characteristic for both approaches is that they are domain specific. For understanding occupational areas and the in-depth insight of work activities the VET researcher has to be an expert of the domain.

The categories and objects of the analysis focusing on curriculum development are also very similar and could be summarised as the characteristic work context concerning a complete work activity as a part of the business and work processes. However, differences can be observed

- in the theoretical foundation and the significance of competence in the analysis model and the curriculum model;
- the definition of the categories for describing the work and
- the principles of structuring the elements of the curricula.

In GAB the orientation of competence development based on the novice-expert-paradigm is characteristic for the whole research process. The analysis of core tasks is adapted to this concept and the following construction of the curricula also integrates the 'logic of development'. For BQ 2000 the constitutive moment of the occupational action system is the work process. Later, the organisation of the work processes is done by service orientation and the following structuring of the curricular elements also by the competence model, but the combination of the analysis and transformation step is not clear.

The difference in the methods and concepts can clearly be seen by comparing the results of two projects. Table II shows the working tasks and work processes for the electrical fitter:

Table II: Comparison of the identified working tasks in BS 2000 and work process in BQ 2000

Electrical fitter	
BS 2000 Working tasks	**BQ 2000 Work process**
• Radio and television: advising, installing, operating • Lightning and high voltage protection: analysing, advising, planning • Instrumentation and control units: mounting, installing, operating • Lighting installation: customer advising service, planning and installation • Antenna and telecommunication units and plants: installing and trouble shooting • Signal units: installing and trouble shooting • Electrical machines and drives: installing and operating • Energy transformation plants: installing and operating • Power supplies: installing, trouble shooting and maintenance • Cables and devices: installing and trouble shooting • Electrical components: customer advising service, planning and installation, planning work process, installing and maintenance • Materials: customer advising service, installation and trouble shooting • Planning the use of tools and testing tools	• Supplying buildings with electric power and its distribution • Supplying buildings with electric lighting • Supplying information and telecommunication units • Installing and mounting information and telecommunication units and devices • Domestic security and protection • Building automation • Advisory, connecting, maintenance and removal of domestic appliances • Automation of industrial plants • Supplying hot water generation • Supplying filament heating

Regarding the results one can see quantitative and qualitative differences. The quantitative differences are a result from the methodological approach. The identified working tasks in BS 2000 are predominantly related to the artefacts e.g. electrical plants and devices of the technological area. The researchers just added verbs of activity to them. In the following development of 'learning fields' this idea is carried on. The identified work processes in BQ 2000 are more related to complete working areas and the working context. This difference is a result from the research concept. BS 2000 started with a matrix derived form the existing curricula. Thus, it is almost logical that the identified working tasks are related to the discipline and organised in a technological way. BQ 2000 described the work process with their all-embracing concept of the occupational field based on profound empirical occupational analysis (figure 6).

To summarise, two different concepts for structuring curricula can be observed: On the one hand, the concepts of GAB and BQ 2000 which are oriented towards a model of competence development. They are therefore more subjective and competence-based. GAB and BQ 2000 assign the 'learning fields' to knowledge and competence levels; on the other hand the concepts of BS 2000 and KUBE are oriented more towards the contents and objects of technology. If the development of competence, and this must be the goal for a curriculum, is following a technological way or even a real work process, this has to be discussed. The systematisation of the 'learning fields' follows the production process, the production circle or the technology (e.g. the way of electrical energy). Thus, the necessity to order the elements and contents of the curricula is interpreted as a 'logic of development' or 'logic of technology'.

The transformation process from occupational fields to 'learning fields' is the focus of most projects. They also apply different criteria usually derived from the critical constructivism educational theory (Klafki 1996). It is to emphasise that a critical evaluation of the identified work process and working tasks is necessary concerning the curricular usability. The projects mention didactical criteria, but do not establish a precise procedure for the transformation process.

5 Conclusions

The differences in the concepts and in the results made in occupational analysis and the developed curricula are an evidence of the imprecise regulation in the new curricular framework. Because of the different approaches there is a variety of different definitions and conceptualisation of terminology, e.g. the difference between working tasks, work processes, occupational field, etc. This is also an indicator for the necessity of further VET-research in the context of occupational analysis and curriculum development. This research should have the following characteristics:

- Analysing occupational fields, work activity, work processes, etc has to be domain-specific to understand the in-depth structure of the work and the required competence. Expertise is domain-specific, this means that the research of expertise can only be done by a researcher who is also an expert of the domain;
- Analysing work activity focused on the development of curricula and therefore on learning processes must be linked. That means not only a concept or method for the empirical analysis of work is necessary, but also a competence model which should be integrated in the analysis concept;
- The transformation step is still an underdeveloped area. For transferring the empirical results into curricula an adequate model procedure is necessary;
- The results of the research process finally must end in the VET-practice which means that VET-teachers or trainers must get useful instruments for the design of work-related curricula or learning situations otherwise the innovation of the 'learning field' will not be like intended.

Appendix 1

Table III: List of pilot projects

Pilot Project	Title	Location
BS 2000	Vocational School 2000 – Learning in work oriented occupational fields	Hamburg
BQ 2000	Vocational education and training 2000	Saxony
ERKUNDA	Customer orientation and service skills in the VET within the automation of buildings	Bremen and Mecklenburg-Western Pomerania
GAB	Business and work process oriented dual-cooperative VET within selected industrial occupations	Lower Saxony and Hesse
KUBE	Customer-oriented vocational skills within the plumbing area	Saxony
NELE	New structures for teaching and learning by 'learning field'	Bavaria and Hessen
SELUBA	Fostering efficiency of new learning concepts and teaching within the dual VET	North Rhine-Westphalia and Saxony-Anhalt

Notes

[1] Pilot projects as a form of innovation have a very long tradition in Germany. Since 1971 more than 2.400 projects in the VET system were carried out. In 1997 the administration (BLK) which is in charge of pilot projects in VET schools decided to install programmes intending to promote innovation and transfer which have more countrywide effects. The first programme is running from 01.10.1998 to 30.09.2003 and funded with approx. 14 million Euro. 21 pilot projects in 14 federal states are part of the programme. In total about 100 VET school and 20 VET research institutes are participating and developing new learning concepts. The Institute Technology and Education of the University of Bremen was installed as the programme administrator and evaluator.

[2] The programme structure and evaluation design defines 4 main criteria, which are work process orientation, fostering vocational competence, self-organised learning processes and holistic forms of learning. Each project defined within these categories their specific objectives of their projects. Altogether more than 100 goals were defined. Hence, a variety of different concepts with different implications were developed in the programme.

[3] Terminology is always a problem in the international discussion. The expression 'learning field' does not really exist in English in this context, but in Germany it also a new expression. A common expression like learning area would not be adequate for the description of the new curricula. This is the old terminology for the discipline oriented structure of curricula. In Germany a learning area e.g. would be 'foundations of electronics' or 'electrical machines'. 'Learning fields' are not structured like this and its contents should not be derived directly form science, because they should refer to the occupational fields. A 'learning field' could be e.g. 'maintenance of a mecatronic system'.

[4] This new framework is only valid for VET schools. In Germany are actually existing two curricula, because of the dual system. The curricula for the initial VET within companies are not affected by the curriculum reform. Therefore the VET law must be reformed.

[5] The necessity to put the elements and contents of curricula into an appropriate order is especially for a long term VET like in Germany very important, because this describes basically the learning way. The manual mentions the criteria 'logic of subject matter' to order the contents. Unfortunately, it does not exactly describe what is meant by that. According to the work-related and competence-based structure, a discipline structure is definitely not adequate. Hence, the question is, if any criterion exists for sequencing curricular contents in the logic of work activity and competence development.

[6] Each step in the manual also contains several analysis questions, which should to be answered for proceed each step. In total there are 63 questions. But the quality of the questions varies a lot. Just to give an example, if one intends to describe occupational fields, a question like 'how can an occupational field be described' does not give the answer. Therefore a precise concept is needed.

[7] Besides the following description GAB also established 'core occupations' by reducing 27 occupational profiles down to 5. Therefore, the question about the borders of occupations appeared. GAB also developed a testing system to evaluate competence development using evaluation tasks.

[8] This is basically the DACUM approach. The main difference between both concepts is that GAB also tries to identify the stages of development of the expert workers to find out a way to order the tasks into a competence model.

[9] Benner approved this concept within the nursery area and found out paradigmatic cases (or developmental working tasks) for nursery (Benner 1996).

[10] The 'learning field' structure of GAB is beyond the curriculum structure for the dual VET-system., because GAB developed integrative curricula for schools and companies.

[11] BQ 2000 applied this approach for the electrical fitter which is a profession in a small-scale enterprise and therefore in some aspects like the work process, work organisation, requirements, products very different in comparison to industrial professions. One researcher was analysing in the first step more than 4.000 customer orders respectively accounts and identified 10 work processes for this occupation.

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Accreditation of Experiential learning in France: *Evaluation and perspectives*

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ABSTRACT

The accreditation of experiential learning (AEL), in French context, is an individualised right for continuing direct access to certification, further formal and non-formal learning and socio-professional promotion. Its introduction has been a gradual process. First, only practitioners in engineering could be accredited as engineers (1934 Act). In the mid-eighties, the 1985 Decree extended it, at the university level, to include supervisors, technicians and management executives. Its generalisation to all categories of working individuals (via the 1992 Act), has been extended and enriched by the Social Modernisation Law (17 January 2002) to include, in addition to work-based learning, learning gained through social and cultural activities. In this context, the focus of this paper will be an investigation, through its two basic sections, into the performance of the AEL regime within the overall educational and training system. In the first section, the formal and effective functioning of the AEL regime will be examined. Drawing upon the results of recent evaluation surveys conducted by the Ministry of Education and some of the qualitative findings of "FAME" Project Field investigation, the second section of the paper will be an evaluation of AEL's effective contributions to lifelong learning and socio-professional promotion of its beneficiaries.

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INTRODUCTION

The accreditation of experiential learning (i.e. "Validation des Acquis de l'Expérience: VAE") is not a new notion to the French educational and training system. Its introduction has been a gradual process in scope and content. Its origin goes back to the 1934 Act (10th July), which provided the first general conditions for the delivery of an "engineer" grade to individuals who accumulated at least five years of working experience in engineering (Lenoir, 1996). Then, the 1985 Decree (23rd August) extended it under the name "VAP" (Validation des Acquis Professionnels) to allow adults to have access to different forms of formal learning at university level (leading to national degrees, starting from at least the supervisor-high technician level, i.e. level III) through the accreditation of their prior formal, informal and non-formal learning. Its generalisation to all categories of working individuals had to wait until the 20th of July 1992, date of its official introduction by the 1992 Act and the successive complementary and implementation regulations (Ravat, 1997a, 1997b; Terrot, 1997; Dif, 1999, 2001). However this generalisation had, at the same time, restricted its application to only work-based prior learning. This is why, it has been recently further extended and enriched, under a new generic acronym name "VAE" (Validation de Acquis de l'Expérience), through the "Social Modernisation Law" (17 January 2002) to include, in addition to work-based learning, learning gained through social and cultural activities.

In the context of this development, the paper will focus through its two basic sections, on the performance of AEL regime ("Validation des Acquis de l'Expérience: VAE") during the last decade (i.e., the stage of its effective formal introduction and implementation). After a brief introduction of the working of the system in practice (section I), its effective contribution to LLL development and socio-professional promotion of the individual beneficiaries will be examined in section II.

Section I: "VAE" regime and it working in practice:

As promoter of life long learning, the accreditation of experiential learning in the spirit of 1992 Act and its recent enrichment (through the Social Modernisation Law of 2002)), is a generalised codification of a new individual right, based on two innovative concepts (1992 Act; Perker & Lairre, 1997; Dif, 1999, 2001):

- Life experience at workplace and outside it is not limited to the application and use of knowledge acquired within the traditionally well established formal educational and training institutions. On the contrary, it is a continuing learning process, which can produce equally recognised competencies and knowledge, which allow for the development of further formal, informal and non-formal learning.
- Furthermore, it contributes to the promotion of learning path-fluidity and complementary between formal and learning in other contexts within an open dynamic and multidimensional approach to identity formation and development in an active citizenship.

It is an individualised right for a continuing access to the process of experiential learning assessment and certification under a certain number of conditions. It allows any individual, who could accumulate regularly or irregularly an experience of five years (reduced recently to three years recently), as a full-time or a part-time worker in at least one activity related to a targeted degree, to apply for an exemption in the required exam-units. Therefore, the beneficiary can be an employee, an artist or an independent worker. This is possible regardless of whether the candidate is still working or looking for work at the moment of applying for an accreditation (Ravat, 1997a; Dif, 1999b).

Accordingly, the "VAE" is to be distinguished from another individualised right for access to a "Bilan de Compétences (BC"), i.e. a "competence assessment". The latter is simply an audit of the individual's personal and professional competencies with the basic aim of supporting the beneficiaries' projects for career development/re-orientation and related further training and learning. It does not give them the right to any direct formal accreditation or certification.

Ultimately, the output of this process covers a wide range of degrees distributed through the French nomenclature for occupational qualification levels (from I to V). They are grouped, according to the 1993 Decree of May the 4th, into the main following categories (Ravat, 1997b):

Secondary school vocational and technical diplomas: (they are run by the Board of High Schools and Colleges and delivered by the Ministry of National Education):
Level V: Employee and qualified worker:
- Vocational aptitude certificate (CAP)
- Vocational studies certificate (BEP) and related complementary grades.

Level IV: Technician, team leader and highly skilled worker:
- Vocational baccalaureate (Bac.pro.)
- Vocational certificate (BP)
- Technological baccalaureate (TBn)
- Technician certificate (BT)
- Vocational certificate in arts (brevet des métiers d'art)

Level III: Supervisor and high technician:
- High technician certificate (BTS)
- Vocational diploma in arts (diplôme des métiers d'art)
- High diploma in applied arts (diplôme supérieur d'arts appliqués)
- High technician diploma (DTS: diplôme de technicien supérieur)

Specific technical and vocational diplomas: They are also delivered by the Ministry of National Education and classified according to the national nomenclature for occupational qualifications into the following three levels:
Level III: Supervisor and high technician
Level IV: Technician, team leader and highly skilled worker
Level V: Employee and qualified worker

University degrees: They include all kinds of higher education general, vocational and technological diplomas (such as DEUG, DEUP, DUT, B.Sc., M.Sc. in engineering, DESS, etc.), with the exception of those linked to medical, paramedical, ontological and pharmaceutical disciplines. The higher education degrees concerned by the "VAE" regime, correspond to the following levels of occupational qualifications:
Levels I and II: Engineer and executive
Level III: Supervisor and high technician

Diplomas in agriculture: They include all kinds of degrees delivered by the Ministry of Agriculture (from "CAP: the vocational aptitude certificate in agriculture" to "BTSA: the higher technician certificate in agriculture"). They correspond to levels from I to V in the national nomenclature of occupational qualifications.

Diplomas in physical education : They include a variety of diplomas linked to the ministry of youth and sport, such as BAPAAT, BEATEP and the vocational certificate for physical education at the primary and secondary level.

These diplomas are generally created under propositions made to the ministry of education by a variety of educational institutions, enterprises and their social partners. The feasibility of the proposals are then examined by the "Professional Consulting Commission". These commissions are composed of experts in the field in addition to representatives of employers and workers. The process of diploma creation is based on the combination of two referential standards : "occupational referential" and "diploma referential".

- The first referential standard ("occupational referential") refers to the identification of the main missions and tasks to be performed by the future holder of the diploma, including the specification of the conditions under which they will be implemented.
- As for the second (i.e. the "diploma referential"), it requires establishing a list of the corresponding skills and knowledge required effectively by the employment process itself.

The effective launch of the implementation of the VAE regime in its extended version was left until the end of 1994. An experimentation period of two years was necessary to allow for feasibility verifications and corrections and to specify final nation-wide working procedures of the whole process.

The process which guarantees a real access to this regime in its generalised version, is functioning through a succession of three categories of individualised accompanying actions: (M.E.N.R.T., 1998; Perker & Lairre, 1997; Ravat, 1997):

First, individualised access to information. On the regional level, each academy is equipped with at least one information stand point to receive individually potential applicants and inform them about the regime and how to benefit from it. This has the advantage of allowing effectively the potential candidates to collect all the necessary information for an overall assessment of the feasibility of their accreditation projects.

In terms of output obtained at this stage, the number of individuals received and informed between the end of 1995 and 2001 attained 110,1000 people. This amounts to 4.5 times the level attained one year after the launch of the implementation process by the end of 1994.

Secondly, an individualised (voluntary) accompaniment in the application process. It is a personalised consulting of the candidate. It is supposed to allow the applicant to build up and shape efficiently, his or her accreditation project. This includes, for instance:

- Choice of the targeted diploma and the exam-exemption units;
- Identification of the most relevant elements to the application, which effectively backs up the applicant's candidature.

At the end of the first year in the effective implementation of the accreditation regime, the number of beneficiaries of an individualised accompaniment attained 2,251 people. By the end of 2001, this number was multiplied by 13.3.

Thirdly, an individualised assessment by an accreditation jury, formally composed of representatives of the Ministry of National Education, experts in the field and employers to evaluate the candidate's application which is usually a four-part file:

- The first part has to include all the formal documents necessary for admission (e.g. an application for exam-exemption units, a motivation letter, formal proof of 3 years working experience , a full description of previous occupational and training tracks, an affidavit for correct information).

- The second part gives a description of previous occupations related to the targeted diploma. It includes a presentation of previous employers and occupations, and a full description of at least two main activities related to the subject of the accreditation (including the conditions in which they were performed).
- The third part is a complement to the previous parts. It contains further information chosen voluntarily by the candidate to back up his or her candidature for an accreditation.
- The fourth part is made up of different questionnaires which cover basic exam-units related to general or transversal core qualifications (such as French language, mathematics, physics, foreign languages, etc.).

The jury analyses all the information contained in the application file to identify the applicant's prior experiential knowledge and competencies which comply with the requirements of the candidate's targeted diploma. The applicant might be interviewed for complementary information. In the light of all this, the jury takes its decision as to whether to accept fully, partially or not at all the exam-exemption units applied for.

Within the framework of this final stage in the working of the sytem, 17,000 applications were evaluated between 1994 and 2001. About 88% of them obtained at least one credit-unit.

Section II: Performance of "VAE" regime

The performance of "VAE" can be assessed in terms of its contribution to the achievement of two layers of interrelated objectives:

- The intermediary objectives specific to its effective implementation and functioning in practice, i.e. in terms of input/output flow (basically quantitative indicators);
- The ultimate objectives such as its contribution:
  - To the development of learning-path fluidity between formal and non-formal learning;
  - To the individual beneficiaries' LLL, employability, flexibility and mobility in particular, and their socio-professional promotion in general.

Its performance in terms of input/output flow:

In this context, there is a distinction between two level-categories of certification and further learning for which the accreditation is usually requested:

- Accreditation for vocational and technical certification linked to the secondary school vocational education and training system (where only the 1992 Act and its implementation decree of 1993 are applicable).
- Accreditation for access to the university-level further (general, vocational and technological) learning and certification. Here both the 1985 Decree (concerning access to higher education) and the 1992 act are applicable.

At the secondary school level of certification:

In 1998, 3,383 accreditation applications were examined (against only 971 in 1995). 77 % of them were made by working individuals, and 23 % concerned those who were unemployed and still searching for work. The participation of the latter (unemployed individuals) has been observed to be increasing (compared to 20 % in 1995). The majority of the applicants (seven out of ten) were aged between 25 and 40 years old. About six out of ten had already accumulated a working experience of 10 years at least. Women were represented through 55% of the total number of submitted applications (M.E.N.R.T, 2000).

As for the requested form of certification, the applicants were interested in all kinds of existing certificates. But, they have a higher preference for "BTS" (higher technician diploma) represented by 44.7%. 21.7% have an increasing preferences for "CAP" (the vocational competence certificate). The third position, is occupied by both the vocational certificate ("BP") and "Bac.Pro" (the vocational baccalaureate) with about 14 %. All these diplomas are dominantly requested within the activities of the tertiary sector (69%) and the industry (26%) (M.E.N.R.T, 2000).

Potential applicants' motivations are basically linked to their decisions to have their experiential work-related learning, formally, recognised. They represent about 52% of the whole number of applicants. Only 17% are motivated by job-conversion and mobility (M.E.N.R.T., 1998/2000).

Concerning the rate of intermediary and final success, 88% of the accreditation applicants succeeded in obtaining partial or full exam-exemption-units in 1998. 69% of theses success cases were obtained in the tertiary sector, followed by the industry with 26,3% (leaving only 4,7% to the construction sector). As for the final certification, out of 5,360 VAE candidates during the period of 1995-1997, 47% of them succeeded in obtaining their targeted diplomas (M.E.N.R.T., 1998).

At the university level of certification:

According to a survey carried out in 1998 by the DPD (Department for Programming and Development) and the DES (Department of Higher Education) of the Ministry of National Education (MNRT) concerning the effective practice of VAE has revealed the following developments:

- Most of the universities have responded favourably to the implementation of the generalised version of the "VAE" by creating the necessary organisational structures for the identification, assessment and the accreditation of experiential learning. About 12,000 accreditation applications were treated in 1998 to a variable degree by all the universities.
- The dominant tendency to continue with the application of VAE in its version limited to the framework of the 1985 Decree: 90 % of the accreditation applications are treated within this framework, i.e. over a third of the universities still do not make use of all the possibilities offered by the generalisation of VAE regime in 1992. This is basically due to the difficulty to make the necessary practical arrangements for its strict implementation at the university level. The VAE in its generalised version requires the use of modular courses in coherence with the prior experiential learning and the individual units of the targeted diplomas tested by an independent jury. In order to increase their chance of success, most of the applicants have preference for an examination based on inter-modular compensations.
- A high rate of accreditation in both versions of "VAE" regime: 80% in the case of the limited version of "VAE" (1985 Decree) and 75% in its generalised form (1992 Act).

- The beneficiaries of VAE regime in its two versions are dominantly employed individuals representing 59%. The unemployed individuals represent only 27%.
- Most of the beneficiaries of the VAE go for general education disciplines: 40% for three-to-four-year university degrees (B.Sc. and M.Sc.), and between 20% to 25% of them for two-year university degrees. Then come those who have preference for vocational education diplomas: 20% on a postgraduate level and less than 10 at the graduate level.

Contribution to the achievement of its ultimate objectives :

In terms of its contribution to the achievement of its ultimate objectives and missions mentioned above (i.e., the second set of performance evaluation criteria) , the "VAE" has many advantages for the beneficiaries, for the organisation and the integration between formal and non formal learning (Dif, 1999 and 2001).

For the beneficiaries, "VAE" has many interdependent advantages, namely:

- Social recognition and promotion of work as means for access to lifelong learning and certification.
- Promotion of vocational and social mobility: Through a continuing accreditation of work-related knowledge and access to further learning, the individuals are more able to:
  - Increase the level of their qualifications and open possibilities for job promotions;
  - Develop and diversify the portfolio of their knowledge, competencies and identities;
  - Adapt to changes in employment requirements and working conditions.

As for its contribution to bridging the link between formal and non-formal learning, it can be achieved through its following interdependent fundamental roles:

- Widening the scope of diploma delivery modes, whereby the traditional formal educational and training activity is no longer the unique way for certification. Learning at and from work is considered, according to this regime, as another mode of vocational and technical diploma delivery.
- Establishing, therefore, a new dynamic and more coherent relationship between occupational activity and formal modes of certification.
- Facilitating the creation of a real self-initiated and directed matching between vocational education and training, employment requirements and the individual's needs for identity and carrier development.
- Development of a learning path-fluidity and complementarity within and between different components of the educational and training system as a whole.

Even for the employer, the "VAE" regime constitutes a new external indicator for human resources evaluation and development within the organisation. It is more objective than the internal performance evaluation procedures. Through a process which combines both "occupational referential" and "diploma referential", the organisation can develop a system which allows for the identification of reliable criteria to be used in optimising its recruitment/training policy and career development schemes for its employees.

However all these identified roles of the regime in favour of employees, employers and the development of learning-path fluidity between formal and non-formal learning, are facing, in practice, two kinds of hindrances linked basically to the scope of its application (Dif, 1999, 2001):

- First of all, it does not cover all the fields of work-related learning. Some highly institutionalised and powerful "collective occupational identities" are still rigid and not open to the application of the regime. This case can be found, for instance, in the medical, paramedical and pharmaceutical sector (Perker & Lairre, 1997).
- Secondly, it does not include, in the context of the extended version of 1992 Act, non-work related learning, especially that related to cultural and social activities.

However, the "Social Modernisation Law" (17 January 2002) social modernisation took effectively into charge part of the shortcomings of "VAE" in its 1992 version, by:

- Extending its scope to take into consideration learning gained through any socio-professional activity (including formal and non-formal learning acquired a broad);
- Introducing the possibility that the VAE process can lead to the accreditation of all the units of the targeted diploma;
- Reinforcing the independence of the accreditation jury;
- Harmonising the related general system of certification and the creation of national repertory for vocational certification.
- Reducing the cumulative experiential learning period from five to three years only.

CONCLUSION

The accreditation of experiential learning regime in its extended and enriched versions has a far reaching implication for the promotion of lifelong learning as it, formally and practically, recognises that:

- Formal learning is not necessarily of greater importance than learning gained through other contexts;
- Learning has a "life-wide" dimension which brings the complementarity of formal, informal and non-formal learning into one focus, implying that learning can and does take place in the family and community, in leisure and daily social, cultural and working-life;
- A learning path-fluidity bridge can be established between formal education and training and other learning contexts by allowing for an equal chance for access to the accreditation of all kinds experiential learning based on common referential criteria.
- That individuals can develop their own vocational identities in a more dynamic and multidimensional context, and consequently be more prepared to cope with the requirement of change and increasing demand for flexibility and mobility;
- The existing diploma-delivery system can be further enriched and widened in scope to allow for an increased access to certification and lifelong learning inside and outside the dominant formal school-based learning system.

However in spite of all the recent reforms and amendments, the "VAE" is still not a shortcoming-free regime, especially in terms of its input flow. Its identifiable limitations are basically twofold:

- It can not be considered as a "pure" inclusion regime. Its beneficiaries are only those with initial qualification background, who are able to accumulate some working experience. In this case, it has the disadvantage of excluding two categories of people:
    - Non-qualified workers and employees (without sufficient initial qualification background);

    - Qualified people who either do not possess enough working experience or are simply denied access to the labour market for reasons other than the usual qualification requirements (i.e. non occupationally included active people).
- Its application scope is fairly limited in the sense that it does not cover all activity sectors. Some institutionalised and powerful "collective occupational identities" are still not open to the application of the regime. This case can be found, for instance, in the medical paramedical, ontological and pharmaceutical sectors.

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Two Work Cultures
- Two Learning Environments[1]

Eva Ellström and Bodil Ekholm

1. Introduction

In the past decade, many Swedish municipalities have undergone comprehensive organisational changes. Notions like competition and customer orientation have inspired much of this reform work (Blom, 1998). The changes have also boosted the emphasis on service and efficiency in municipal activities (Jansson & Forssell, 1995). In the 1990s, in an effort to meet demands for both improved efficiency and more 'user-friendly' activities, many municipalities introduced what has come to be known as the 'client-provider' model of governance (Blom, 1998; Gustafsson, 1994). Overall, the assumed effects of these changes include demands for new or modified skills among management and staff (Magnusson, 1999), and especially for more wide-ranging expertise than before (Wadensjö, 1999). The timing of this new way of organising municipal activities was hardly an arbitrary choice. Rather, it may be seen as an attempt to meet and tackle resource cutbacks and, simultaneously, the raised requirements imposed on municipal activities.

During the same period, through the 'Ädel reform' that came into force on 1 January 1992, the municipalities assumed overall responsibility for long-term care services for the elderly and people with disabilities — functions that previously fell within the county councils' sphere of responsibility (Swedish National Board of Health and Welfare, 1996). During 1995 a reform for people with mental disabilities was implemented. This entailed an extension of municipal responsibility for people with mental problems — another former county-council responsibility (Johansson, 1995). The new organisation has, to the staff of the home-help service, meant an increased sphere of responsibility and, accordingly, new circumstances to deal with (Astvik & Aronsson, 2000). In addition, there have been increased saving requirements that, in practice, have called for more stringent priorities to be applied in municipal assistance measures. Nowadays, fewer and fewer people receive help and inputs are concentrated on the oldest and most in need. This has, in many cases, involved an increase in the care burden on home helpers (Daatland, 1997).

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Given these considerations, the purpose of this study is to describe and analyze the learning environment within home-help services within a Swedish municipality. The focus concerns to what extent the working conditions, in a broad sense, are likely to facilitate or restrict on-the-job learning about care provision, and, thereby, the staff's capacity to cope with the complex tasks and demands that they face in their day-to-day work.[2]

2. Conceptual Framework

One common way of meeting the development needs that arise when skills requirements for an occupation change is to offer in-service training of various kinds. What distinguishes this approach to learning is a strong focus on individual rather than collective learning (Ohlsson, 1996), and on formal qualifications and educational level rather than actual skills. Our initial assumption is, instead, that one should also take into account the informal learning that takes place in and through day-to-day work, and also the interplay and mutual dependence between formal education and informal learning. In line with this approach, we focus in this study on learning as an integral part of practical work, and in interaction with co-workers in various situations (for an up-to-date overview of research on learning in day-to-day work, see Boud & Garrick, 1999).

On the basis of earlier research on learning at work, at least two types of learning may be distinguished. One type involves learning about the job itself by acquiring proficiency in specific tasks, problems, methods or ways of working, i.e. learning a particular manner of performing the duties concerned that, by tradition, is perceived as the 'right way'. This learning may be termed 'instrumental' (Mezirov, 1991), 'reproductive' or 'mastery' learning (Ellström, 1992; 2000; Engeström, 1987).

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[2] This chapter is based on a study of the home-help service as a learning environment (Ellström, E. & Ekholm, B., 2001).

The second type of learning, which may be described as more critically reflective in nature, enables the individual learner to question prevailing work patterns and develop new ways of coping with the duties and problems involved in the job. This learning may be termed 'innovative' (Engeström, 1999) or 'developmental' learning (Ellström, 1992; 2000).

Much of the literature on learning at work stems from the assumption that this learning takes place on the basis of learning individuals' conduct and the experience they may gain from this conduct. However, experience-based learning has been subjected to criticism of various kinds (see, for example, Miettinen, 2000).

Experience-based learning has sometimes been discussed in terms of problems, owing to its capacity for resulting in innovative thinking and not merely affording mastery of established practical procedures. This risk is perhaps most striking in a situational perspective on learning (see e.g. Lave & Wenger, 1991), with its focus on learning through participation in an established set of practical arrangements. This is because it is, to a high degree, a matter of learning to perform the practical work in a manner similar to that of more experienced colleagues. Here, the risk is that there will be an emphasis on existing routines and traditions that squeeze out questioning and alternative thinking, and thus the more developmental kinds of learning.

Another category of problems mooted in connection with experience-based learning concerns the way in which routines emerge in activities that are repeated daily in practical activities — routines in the form of unreflecting, habitual acts performed without any higher degree of thinking (cf. the notion of 'mindless action', Langer, 1989). Since routine action patterns are largely unconscious, this means that they are difficult to get at and reflect on. One consequence of this situation is that established ways then become inaccessible to change and development.

Moreover, one central issue when it comes to experience-based learning is what may be learnt from experience gained in various practical situations. Several researchers express doubt about experience-based learning and its potential as a basis for developing general principles. Individuals have proved to have difficulty in translating their experience-derived learning into principles of general application. However, other researchers — such as Kvernbekk (1995), Schön (1983) and Fischer (1998) — believe that, through their experience in many unique situations, individuals develop notions and assumptions about what will happen in the next situation. In this sense, the practician develops a kind of generalised knowledge based on the similarities between different situations.

How, then, can we promote developmental learning in day-to-day work? What does it take to create preconditions for a good balance between the reproductive, mastery and developmental types of learning, i.e. a situation in which reproductive learning does not predominate? Below, we shall distinguish four groups of factors that we deem essential to an understanding of the home-help service as a learning environment. The model presented in Figure 1 is intended to reflect, at various levels, factors that may constitute significant preconditions for skills-enhancing learning on the job. The model should not be seen as being causal in nature, but rather as a theoretical construct that may help to bring about greater understanding of factors, at various levels, that may significantly facilitate or restrict learning processes at work. Below, we also give a more detailed account of the four different groups of factors included in our conceptual framework.

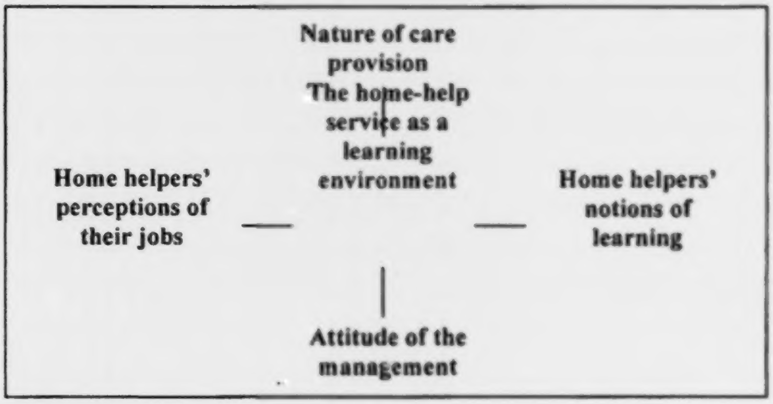
Nature of care provision
The home-help service as a learning environment
Home helpers' perceptions of their jobs
Home helpers' notions of learning
Attitude of the management

Figure 1 Conceptual framework with respect to factors of significance to the home-help service as a learning environment.

The *nature of care provision* refers to its scope for contributing to the personal development and learning of those who perform the work, i.e. the home helpers. One basic assumption is that the nature of the work — content, skills requirements, planning, organisation etc — is significant in this respect (see e.g. Boud & Garrik, 1999; Ellström, 1992; and Marsick,

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1987). A job requiring advanced skills probably affords greater scope for resulting in development and learning than one with low skills requirements. A job that poses few challenges may become a matter of routine and, accordingly, impair the employee's development potential. Another aspect when it comes to the nature of the work is the manner in which work is planned and organised. Here, it may be expected to afford varying scope for learning, depending on work planning and organisation.

One basic assumption regarding *home helpers' perceptions of their jobs* is that notions and perceptions of the work from various points of view may contribute to whether the tasks involved are also seen as a possible source of learning (see Antonovsky, 1993; Cook-Gumperz & Hanna, 1997; and Marsick & Watkins, 1987). Here, the focus is on how home-help work is perceived, in terms of both content and the home helpers' perceptions of their jobs' significance, both to themselves and to others who are directly or indirectly affected. This factor also includes the home helpers' perceptions of their scope for manoeuvre, i.e. what they feel are their chances of influencing the nature of the work.

When it comes to the *home helpers' notions of learning*, one basic assumption is that their personal notions of learning can also affect their prospects of taking the opportunities for learning that are available within the framework of their jobs (see Schommer, 1998 and Säljö, 2000). Here, the focus is on home helpers' view of learning, how they become proficient at their jobs and how they themselves assess the scope for learning in the course of their practical duties. This factor includes the scope for sharing of knowledge and experience that home helpers deem to exist in the home-help service, and the obstacles to learning that they themselves perceive.

'*Attitude of the management*' relates to managerial notions, values and action patterns, and their importance in encouraging learning and development in the home-help service. One basic assumption here is that, through its way of directing day-to-day work, management can promote or restrict opportunities for learning in the organisation (see, for example, Blanchard, 1996; Goldsmith, 1996; Senge, 1990; and Södergren, 1996). Here, for example, the management's view of the content of its own leadership, i.e. the duties of leadership to be given priority, may be important. Does the manager, for example, regard it as important to be available for the exchange of knowledge? The management's own attitude towards learning may also have a bearing on how planning for the care personnel's skills development and learning takes place. For example, are meetings planned and arranged for the management and home helpers to get together and discuss the work?

3. Two Case Studies

To afford understanding of the scope for knowledge development and learning in home-help work, care staff at two home-help units were interviewed. In this study, we called these units *Eken* ('The Oak') and *Björken* ('The Birch'). These two units are located in a large municipality in southern Sweden. Eken is in a central location, and provides service in a district consisting mainly of elderly women who need home help. From a socioeconomic point of view, this area may be regarded as a high-status area. Björken is in a peripheral area, and provides service in a district that, socially, has greater problems to deal with and may, in socioeconomic terms, be regarded as a low-status area. In this area, there is wide variation in the care recipients' needs: there are, for example, young people who need home help owing to their alcoholism or mental problems, and families in need of support and help. The majority of care recipients are, however, elderly people.

The study comprises a total of four teams, two at each unit. At Eken there is an 'in-house team' (which works in the service building) comprising a staff group of ten, and an 'outreach team' (which works with care recipients in ordinary flats) of seven. The average ages of staff in these two teams are 46 and 47 respectively, and most of the home helpers have very long experience of work in elderly care. The two teams differ with respect to the home helpers' training. In the in-house team, there are three home helpers with training as assistant nurses or nursing assistants, i.e. training courses with a medical orientation. The members of the outreach team have no such training. The head and deputy head of the Eken unit have been employed in a managerial capacity for 20 and 15 years respectively. The unit head has a degree in public administration, and the deputy head is a nurse.

At Björken, six people work in each team and do so both outside the service building, in the surrounding area, and inside it. There is an appreciable difference in the working groups' composition, in terms of age and education alike. In Team 1, the average age is 28 and the majority were trained in social services and have relatively long experience of work in elderly care. In Team II, the average age is 54 and all the home helpers have been trained on courses lasting ten or 20 weeks. Most people in this group have very long experience of work in elderly care. At Björken, both the managers have long experience of care provision in elderly care: they have been employed as managers for 13 years and are both assistant nurses with training in social care services.

The interviews forming the basis of the results in this study were conducted with 17 home helpers at Eken, 12 home helpers at Björken, and the head and deputy head at each unit. In addition, two heads of the activity areas were interviewed. The interviews were based on the following question areas:

1. Content of the work. Here, the focus was on the content of day-to-day work in the home-help service and its variation. More specifically, such aspects as regulations and routines, and opportunities for flexibility and personal responsibility, were described.
2. Participation, influence and perceived scope for action. The care personnel's perception of their influence on activities, i.e. how far they felt they could affect the nature of the work (what is done) and its implementation (how the work is done).
3. Job requirements in terms of skills, perceived skills requirements and scope for exchange of experience. Here, one focus was on the skills staff regarded as necessary to do a good job, and another was what they perceived as the shortcomings in their own skills.
4. Feedback. In this area, the feedback that the care staff perceived they were getting from the managers, their colleagues, care recipients, etc was explored.
5. The role of management. Here, the focus was both on management's role when it came to creating scope for the home helpers' learning and developing work, and on home helpers' expectations regarding the management's role in care provision.

4. Results

In summary, we present a few principal results of the study. When it came to planning and organisation of the work, we were able to distinguish, broadly, a twofold orientation: towards, first, care recipients and duties ('task/recipient orientation') and, secondly, the home helpers' own work situation and working hours ('time/home helper-controlled orientation'). In the former, with the focus on care recipients and duties, the importance of securing continuity for the care recipients is, for example, emphasised. In the latter, with the focus on the home helpers' own work situation and working hours, one aspect emphasised is an equitable allocation of problematical care recipients.

When it came to their perceptions of the work, the home helpers stressed that their jobs were important and made a difference both to themselves and to the care recipients, their relatives and society. The scope for action both in terms of *what* their work should consist in, i.e. the regulations governing care provision, was perceived as limiting by most home helpers. When it came to *how* the work involved in care should be implemented, it emerged that the home helpers generally perceived more freedom of action. Admittedly they were obliged, in many cases, to adapt to the care recipient's wishes, but their perception was nonetheless that they were able, according to their own judgement, to influence the ways in which the work was performed.

The majority of home helpers stated that the key source of learning was their own work. This learning took place, in the course of practical care provision, through their own experience; but it was also derived from co-workers when people worked together. The matters then discussed primarily involved the practical, not the emotional side of the work. The staff's attitudes concerning what various training courses had meant to their work varied. Staff members whose training in social care was brief were more doubtful about the importance both of basic training and of various in-service and advanced training courses compared with those who had received longer care training.

The management stated that their duties were mainly administrative in nature and that they did not perceive themselves as important to the care staff's learning except, possibly, in an indirect way by arranging in-service courses. We found that the managers' accessibility in terms of sharing their knowledge and experience with the home helpers differed between the two units. At Eken, managers and staff met regularly at coffee and lunch breaks and also for morning meetings, while at Björken their get-togethers were more unplanned.

In the interview analysis we carried out, two different work cultures crystallised. These may be assumed to entail different conditions for care providers' learning. In the following section, we present these two cultures.

5. Two Work Cultures - Two Learning Environments

The divergent conditions prevailing in the teams at Eken and Björken may be interpreted as manifestations of two different work cultures. Table 1 below presents some of the aspects that define these two work cultures. These aspects are (a) the ways of planning and organising care provision; (b) the duties given priority; (c) subjective attitudes towards development and learning on the job; and (d) the management's role in care provision. Our analysis brings to the fore cultural differences both between the units and between work teams within one and the same unit.

What we term '*work culture focusing on care and supervision*' is characterised by the emphasis not only on such practical chores as cleaning, laundry, shopping, etc, but also on social aspects of care, such as sitting and talking to the care recipients, going on outings, etc. Moreover, care provision in this culture is characterised by a high degree of independence and flexibility, and relatively little planning and organisation. The work is highly focused on the current situation, 'here and now'. The home helpers take their own decisions about their work, without management involvement. There is a widespread attitude among care personnel that training is relatively unimportant when it comes to the provision of care. Accordingly, training has no crucial bearing on the performance of the work in this culture; instead, the main learning takes place in the course of the practical work, when the home helper is alone or with others. This culture may be said to dominate the work at Björken.

The other work culture that emerges may be designated as *rehabilitation-oriented*. This culture may, using the concept propounded by Waerness (1983), be described as more vocationally oriented, i.e. there is an endeavour to bring the work into line with a 'real' job, and not one equated to the performance of traditional housekeeping chores. Here, rehabilitation and treatment of the care recipients are emphasised. This is shown, for example, in the prominent part played by planning and organisation in care provision. The importance of training is also stressed in rehabilitation-oriented work culture. In this culture, the management also plays a prominent role, especially as a discussion partner and support in the work. This culture may be said to dominate the activities of Eken's in-house team.

Table 1. Two Work Cultures — Two Learning Environments

Aspect	**Work culture focusing on care and supervision**	**Work culture focusing on rehabilitation**
Planning and organisation of care	Time and home helper orientation	Task and care-recipient orientation
Care recipients' demands	Low	High
Meetings to discuss care recipients	Informal meetings — morning coffee breaks etc	Formal meetings — planning sessions, morning and Monday meetings, lunches, coffee breaks
Duties especially emphasised	• Care duties (cleaning, laundry, shopping, etc.) • Social duties ('talking to care recipients')	• Social-training duties ('help for self-help') • Social duties ('talking to care recipients') • 'Skilled' duties
Attitudes towards learning on the job	Learning through practical work and colleagues is emphasised. In-service and further training courses are less prominent.	Learning through in-service training, practical work and co-workers. The importance of in-service and further training is emphasised.
Attitudes towards personal learning	A few home helpers are in favour of learning by taking their own initiatives. Newspaper articles, books and magazines are mentioned.	Many home helpers state that they learn through their work by taking their own initiatives. Many specific examples are given (courses, TV programmes, articles, etc.).
Management's accessibility	Low degree of accessibility	High degree of accessibility

In these two work cultures, there may also be assumed to be different learning environments. In the rehabilitation-oriented culture, there is a focus on development of activities: employees plan and discuss measures with their teams and the management. This kind of approach may be assumed to result in learning through the representation of various categories of expertise and perspectives in this discussion, affording 'cross-fertilisation'. There is also a positive attitude towards the fact that, besides the learning that takes place on the job, employees can develop their vocational knowledge at work through in-service training and personal initiatives. This attitude is found among the care personnel and management alike. In the culture focusing on care and supervision, on the other hand, work is more oriented towards looking after and helping care recipients, as far as the care provider is able, on the basis of the needs that arise at any given time. There is some uncertainty in this culture when it comes to various ways of planning for skills development at work, for example through in-service training or personal initiatives. The learning environment in this work culture may be seen as a more adaptation-oriented environment in which prompt solutions are sought in response to the needs that arise in practice. Looking at the learning environments in these two learning cultures, we can see that the rehabilitation-oriented work culture affords better scope for developmental learning that is based more on questioning prevailing routines and an endeavour to devise new ways of working.

A rehabilitation-oriented work culture is manifested more obviously in the Eken in-house team. Eken's outreach team has features of both a rehabilitation-oriented work culture and one oriented towards care and supervision. One might interpret these as 'spill-over effects' between the two cultures (Ekholm & Ellström, 2000) in this work team. Although care is planned and organised to a high degree, there are also clear elements of a culture of care in which care provision and social intercourse are emphasised. This may be interpreted as showing that many home helpers are bearers of a 'housekeeper culture' while, at the same time, their work calls for administrative norms and routines.

One question that then arises is how to interpret the fact of divergent cultures emerging not only among the various units, but also within one and the same unit. Are there any differences between the units and teams that can make this result understandable? One key difference between the two units is the varying socioeconomic nature of the areas, and this was also one point of departure in the selection process. The care staff in the various home-help districts describe care-recipient demands of a partially differing nature (cf. Szebehely, 1995). The staff at Eken point out that the care recipients' demands for the care to be provided are very high — so high that the staff often feel 'inadequate'. No corresponding demands from the care recipients at Björken are reported by the staff at that unit. One key implication of these various demand levels is that the demands are a clear starting point for the orientation and content of the care provided. This applies particularly today, when user influence is emphasised in municipal services. Care recipients may also have varying types of demands depending on divergent help requirements at the two units. At Björken, the care-recipient group comprises both elderly people and those with mental and social problems, while the care-recipient group at Eken consists of elderly people, mainly with medical needs. When it comes to understanding the cultural differences that prevail *within* Eken between the two work teams, however, these differing conditions do not suffice to explain the cultural differences.

Another difference that may contribute to an understanding of the emergence of the different cultures is the varying level of home helpers' training in the various teams. Eken's in-house team includes more home helpers with healthcare training at upper-secondary level than in the other work teams. The training received by the other work teams (the outreach team at Eken and the two work teams at Björken) consists either of short courses in care (this applies mainly to the older members of staff) or of training courses focusing on social services (younger care staff). One cautious interpretation may be that the emergence of a rehabilitation-oriented culture is promoted by high and clear care demands made by care recipients, coupled with the staff's relatively good educational resources for meeting and managing these demands.

Regardless of how these work cultures and their emergence are interpreted, the existence of cultural differences of this type in an activity may itself constitute a driving force in developmental learning. By being clarified and discussed, the existence of distinct work cultures may 'open people's eyes' to reflecting on, and critically testing, their own work culture — and perhaps also, by the same token, initiatives for trying out new approaches to the work.

In the light of this analysis of work cultures we shall, by way of conclusion, discuss scope for learning in day-to-day care provision.

Conditions for Developmental Learning

In this section, we single out some areas we find crucial to fostering developmental learning at work: conditions in the work team; management attitudes; support for learning; and time factors.

The Work Team – a Key Arena for Exchange of Experience and Reflection

Organising work in teams has, in recent years, become common in many different types of activity. Team-organised work does not, however, automatically entail the creation of opportunities for exchange of experience and reflection. Although the home-help service is organised in teams, care provision is largely a solitary job, in which the home helpers take their own decisions on the basis of their own knowledge and experience. At neither of the two units studied were meetings planned for the express purpose of serving as forums for sharing of experience and reflection about the work. However, the study shows that there is some spontaneous exchange of experience between the care staff in various situations. Examples of such situations are the team's morning planning sessions, when they work in pairs with individual care recipients, and communication during the morning break or in 'off the cuff', in various casual situations that arise.

What all these situations have in common is that they are not intended and designed for more systematic exchange of experience. Rather, they consist in casual encounters. Such encounters do not usually invite deep discussion and working-through of experience in day-to-day work. Instead, reality 'here and now' in the form of new duties usually takes the upper hand, and there is therefore seldom time to process the experience gained. The exchange is also perceived as fragmentary and focused on the 'here and now', and it is above all practical solutions that are discussed. The activities studied were characterised by more of a 'doing' than a 'discussing' culture. Theoretical discussion of the work was subordinated to practicalities and not deemed to be a genuine part of the job. In the discussions between staff members that nevertheless occur, for example in breaks or at meetings, however, it appears to be difficult to move from an anecdotal to a more analytical and reflexive level (Davies, 1996; Ellström, Ekholm & Ellström, 2000).

The lack of forums in which various problem situations or dilemmas can be discussed means that further dissemination of the care staff's ideas and knowledge is difficult. Knowledge, experience and routines are not brought to the fore for discussion and scrutiny; nor, accordingly, can they be put to use and contribute to favourable development for the personnel, work or care recipients. There is therefore also a major risk of inferior arrangements persisting because they have not been subjected to reflection and discussion.

Team Composition and Ways of Working

The impact of team composition on learning opportunities in the teams is not considered. The composition of teams appears to be determined in an ad hoc way on the basis of, for example, the care personnel's wishes to work with particular care recipients or to work in teams that are homogeneous in terms of age. This circumstance may be regarded as an example of the personal orientation that Waerness (1983) and Fahlström (1999) identify as significant for women in the care sector.

From a learning perspective (e.g. Fiol, 1994) one can, instead, pinpoint the importance of a balance, in terms of team composition, between, on the one hand, excessive heterogeneity in terms of attitudes, personality, competence and so forth, with the concomitant risks of destructive conflicts, and excessive homogeneity on the other hand, with concomitant risks of uniformity in ways of thinking and patterns of behaviour in the team. The latter risk has attracted attention, not least in research on the phenomenon of 'groupthink' (Janis, 1982), with its risks of a 'levelling-down' mentality, self-affirmation, filtering-away of information that is perceived by the group as negative, and resistance to learning new things. Both expansion of the scope for learning through more heterogeneous work teams and allowing home helpers to go on working with the care recipients with whom they have established good working relationships would have required planning of team composition with reference to *both* these points of departure, but this did not happen.

This line of reasoning may also be related to studies of what has been termed a 'task-oriented', as opposed to a 'relationship-oriented' way of working. Based on a study of child-care services Lantz & Pingels (1988), for example, showed how a task-oriented way of working was in many cases exposed to competition from a relationship-oriented way of working. The results of their study showed that satisfactory working relationships between group members were more important than satisfactory performance of the group's function. Since the staff strove to resemble one another as much as possible in their respective groups, they avoided using their skills and experience in such a way as to be regarded as being dominant or exercising leadership (see Ekholm & Hedin, 1991). Conflicts and contradictions were averted, and it was perceived as important for everyone to think the same. Differences of opinion were denied.

Management and Work Organisation

Leadership in the work, and how it is exerted at team meetings, may be assumed to have a major potential bearing on the scope for creating a constructive dialogue and making the team meetings arenas for reflection and exchange of experience. In this study there were, however, no indications that the management at the two units studied (unit managers and deputy managers) considered that they had any such function. Nor was there thought to be any function of more generally supporting and favouring staff learning and troubleshooting capacity. Instead, their work appeared to have focused primarily on administration, budget and planning work.

Accessibility and scope for direct liaison with staff were limited. The leadership at these units appears, instead, to be in the nature of indirect leadership. There are, however, exceptions to this, especially regarding the unit and the teams that were bearers of what we have previously termed a rehabilitation-oriented work culture. Here, there was a considerably higher degree of management accessibility, and the managers also served as discussion partners and supported the staff in their work. But an explicit ambition to support and pave the way for staff learning did not exist here either.

Another aspect that is related to the management and organisation of activities is staff participation in planning, development and follow-up. There is substantial potential in this kind of participation for making use of staff skills and promoting learning. One specific task in which the care stuff should be able to assist is, for example, needs assessment of care recipients. These assessments were, instead, carried out by special staff from the social-services administration ('assistance administrators') or by the deputy head of the unit. This procedure means, first, that the home helpers receive only limited information about the care recipients' needs and, secondly, that their vocational skills are not put to use. At the same time, in practice, the care staff may be expected to reach their own assessments of the duties they consider necessary for the care recipients concerned.

Support for Learning

The fact that we are constantly gaining experience in our interaction with our surroundings does not necessarily mean that we also learn anything from this experience (Brehmer, 1980; Ellström, 1996). In order for us to learn from experience, one of several preconditions is that we have knowledge that helps us to identify, interpret and reflect on the information that our experience gives us. Experience-based learning thus requires us to have access to notions and knowledge that help us to learn from the experience we gain. Simultaneously, even for only moderately complex tasks, it has proved to be very difficult for individuals to develop notions and knowledge on the basis of experience.

One conclusion from this is that learning from experience is not self-supporting, but must be supported in various ways. One such way may be training inputs that focus on knowledge development in relation to problems and phenomena in day-to-day work. To make this feasible, it is valuable to create recurrent opportunities for reflection and sharing of experience on an everyday basis. Those who perform the work then get a chance of distancing themselves from, and critically examining, day-to-day activities.

Time for Learning

Learning presupposes activity where there is scope for reflection, alternative thinking and scrutiny of new ways of working. Although attention has all too seldom been paid to the matter, time is a key resource in this context. Examples are time for making observations; time for reflection on the outcome of activities in relation to their objectives and processes; time for dialogue and exchange of experience; and time for alternative thinking and practical testing of alternative methods and ways of working.

Here, there may be a contradiction between opportunities for developmental learning and growing demands for time rationalisation and speed in many activities. Since developmental learning is essentially based on scope for discussion, reflection and contrasts of perspective, there is a major risk of excessively far-reaching time rationalisation eliminating not only this scope but also opportunities for learning integrated with day-to-day production.

One of the difficulties of creating the requisite opportunities for developmental learning in day-to-day work is, however, the fact that the value of learning activities, in the form of boosted development potential and long-term survival, is both more remote in time and less reliable than the more easily estimated value of time for production. What is required is the dual task of organising work so that it both satisfies lofty work objectives and also leaves ample scope for development work and learning. How this task is to be managed in practice depends ultimately, however, on the priorities and choices that various players — politicians, management, trade-union representatives and employees — make daily within the framework of resource and other limitations.

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Martin Fischer and Peter Röben

Organisational learning and knowledge sharing: The use, documentation and dissemination of work process knowledge

Abstract: The concept of organisational learning as differentiated from individual learning is often lacking of theoretical clarification and empirical evidence. This contribution presents findings from the 5th FP project OrgLearn, i.e. results of an empirical investigation into processes of organisational learning in large chemical companies within 4 European countries. One essential content of measures for organisational learning found in our empirical investigation are methods of knowledge sharing and knowledge management. In particular, a case study from Germany is presented which describes both a managerial and a participatory approach.

1 Introduction

According to German managers the 'learning organisation' does exist to a high degree in German companies. A survey on the use of new management concepts in 102 medium and large companies in Germany showed that for 90 per cent of them the concept of the 'learning organisation' was known and 70 per cent said they used it (see Perlitz, 1997: p.9). In another company survey, the concept of the 'learning company' was seen as important by 90 per cent of the sample and 49 per cent said they had implemented it (Bullinger et al., 1997: p.81).

The problem of these empirical surveys is that they only sound out the interviewees on 'buzzwords'. These managers may only be attributing learning organisation characteristics to themselves. They are more a reflection of the image the managers have of their companies rather than what actually happens. This impression is reinforced if we look more closely at the concepts managing directors have of a learning company or a learning organisation. The German management magazines (*Manager Magazin*,1995: pp.141-144, and *Personalführung*, 1995) reported that several companies claimed to be learning companies. One of them saw itself as a learning company because it had significantly reduced its 'door-to-door times, set-up times and stocks'. Others regard themselves as learning organisations because they 'deal with cost systems, report systems and special orders in project teams'. The 'introduction of group work and flat hierarchies' was also mentioned as evidence as were 'measures for continuous improvement', 'customer orientation', 'lean management' and so on.

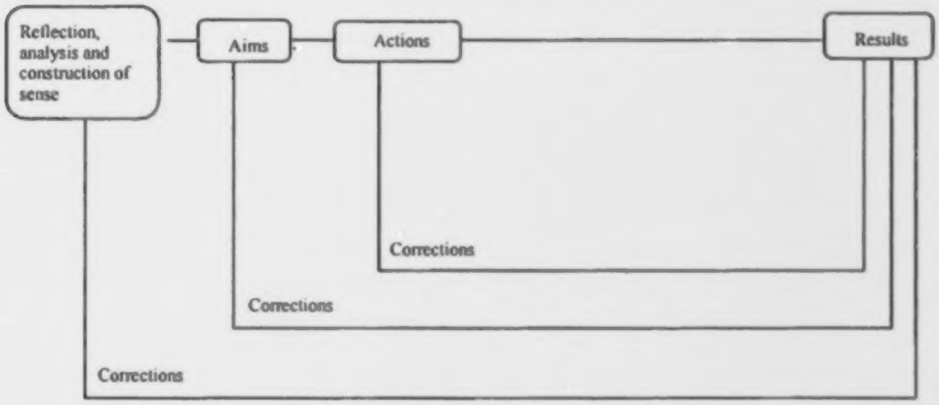
Apparently, it is necessary to relate empirical findings in the realm of organisational learning to theoretical considerations. Terms like 'organisational learning' 'learning company' etc do not make much sense if they are solely identified with a number of individuals who learn. In this paper the framework of an empirical investigation into processes of organisational learning in the European chemical industry is presented. It is based on the question how organisational learning can be differentiated from pure individual learning. Concepts which give answers to this question are briefly mentioned. These concepts have been transformed into criteria under which it is justifiable to speak of a 'learning company' as differentiated from learning individuals on one hand and corporate restructuring on the other hand.

2 Considerations towards a framework concept for investigating measures and processes of organisational learning

Many definitions of organisational learning emphasise that individual learning processes are seen as a precondition for organisational learning. However, they also emphasise that learning by a company is different from and should be regarded as more than the sum of individual learning processes (cf. Probst & Büchel 1998: 19; Senge 1997: 171; Sonntag 1996: 67). How could that be?

One of the early answers to this question stems from Argyris & Schön ((1978). According to Argyris & Schön organisational learning takes place within a defined framework, which is set by the collective theories-in-use of the members of the organisation. This framework describes also an ideal state of the organisation. Argyris and Schön have built three levels of organisational learning on this basis: the single loop learning, the double loop learning and the deutero learning.

In figure 1 the concept of deutero learning is interpreted by the St. Gallen School of Economics in Switzerland (Gilbert Probst et al. 1998) as reflection, analysis and sense-making on a company level, as learning about individual learning processes which happened in the company. In accordance to Chris Argyris and Donald Schön we speak of a learning organisation especially if this organisation engages into processes of double-loop and deutero learning. This means that the individual not only receives a feedback by chance concerning his or her (unsuccessful) work acting so that he or she might draw conclusions from this feedback in order to avoid futures mistakes (single-loop learning). Organisational learning in the sense of double-loop and deutero learning implies that the organisation has created a *structure* through which individual learning is permanently stimulated, documented and evaluated. It is this organisational structure by which organisational learning is differentiated from pure individual learning. In other words: organisational learning changes the *structures* and not only the *people*. The structures regarded as all the personal, interpersonal and non-personal preconditions of an organisation (cf. Neuberger 1991).



after Argyris/Schön, 1978

Figure 1: Deutero-learning (source: Probst & Büchel 1998: 38)

Such a structure is only put into practice, however, if organisational learning is not only a formal demand but a *cultural phenomenon* - an idea which is represented by Edgar Schein (1992, 1995) who conceptualised a culture of organisational learning: 'a pattern of shared basic assumptions that the group learned as it solved its problems of external adaptation and internal integration, that has worked well enough to be taught to new members as the correct way to perceive, think and feel in relation to these problems'.

How to implement such a culture of organisational learning? Peter Senge (1996, 1997) gives an answer to this question by describing elements of a *systemic interventionist management practice*.

All of these concepts claim to point beyond the individual learning of the employees. As a common denominator they share their focus: the companies' practice of systemic reflection and change of the company culture towards learning. This should reach the level of considering the *relationship between enterprise and society*, as Harald Geißler (1996) pointed out.

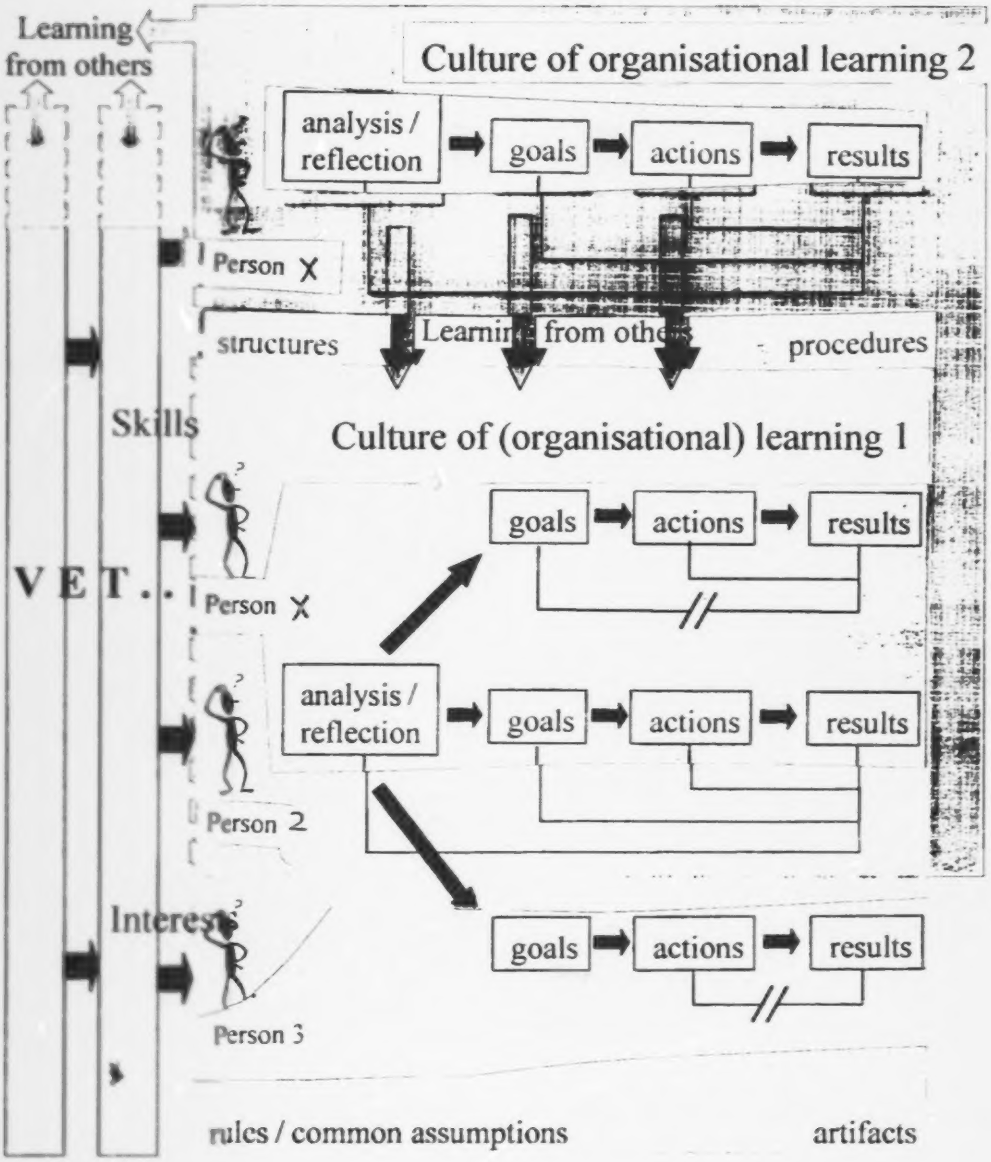


Figure 2: Organisational learning as a change of culture

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If we integrate the concepts mentioned into each other then the subject of empirical research about organisational learning becomes clearer. The main question is how companies transform their current culture of learning which contains elements of learning-refusal, individual and organisational learning into a culture of learning which stimulates individual learning processes and benefits from them on a organisational level. Such a transformation is visualised in figure 2.

It has to be discussed how the structure of a learning organisation (the structural dimension of organisational learning) may influence processes of learning within the organisation (the process dimension of organisational learning) and how these learning processes lead to an improvement of the organisational structure again. The most relevant criteria derived from a literature review (Fischer & Röben 2001) for this are indicated below:

Criterion 1. Organisational work routines are being evaluated and improved.

Indicators

1.1 The organisation's overall market position, strategic objectives and business plan are under constant review and revision.

1.2 Problem-solving groups (either task groups, or self-managing teams) identify and solve problems in standard operating procedures and make recommendations for altering them.

1.3 Finding ways of improving performance, and communicating these when necessary to colleagues and management, is an accepted part of everyone's job.

1.4 Organisational developments that create opportunities for learning are integrated into the work process.

1.5 There is a willingness to change procedures to meet quality management and continuous improvement requirements.

Criterion 2. Formal and informal learning processes are being evaluated and improved.

Indicators

2.1 There are formal inquiries into organisational learning processes in order to identify learning deficiencies and to draw conclusions from them.

2.2 People are prepared to challenge assumptions, to question and exchange ideas to gain maximum learning.

2.3 The active exchange of ideas and information is frequently and actively sought across boundaries.

2.4 Learning processes are stimulated, supported, evaluated and results disseminated.

2.5 Managers take on the roles of coaching, mentoring and facilitating learning.

2.6 A plurality of modern forms of learning exist.

2.7 Roles and careers are flexibly structured to allow for experimentation, growth and adaptation.

Criterion 3. Transformations are occurring in the culture of the organisation.

Indicators

3.1 Staff perceive a difference between the organisation's current standards and what they ought to be.

3.2 Staff feel personally committed to closing the gap.

3.3 Staff are empowered to change, and are actively participating in the change process.

3.4 There is a readiness to change the structure of work and learning.

3.5 There is a readiness to introduce and improve artifacts in order to increase learning opportunities.

3.6 There is a readiness to change rules and common assumptions.

3.7 There are feedback loops in place to evaluate any intervention aimed at achieving change in response to external challenges.

3.8 There are systems in place to allow people to make different contributions and draw different rewards.

Criterion 4. Knowledge is being created within the organisation, at different levels (not only by the managers/scientists) and it is being shared within the organisation.

Indicators

4.1 Knowledge creation projects are officially sponsored throughout the organisation.

4.2 Informal knowledge creation is encouraged.

4.3 There is a formal system for distributing knowledge throughout the organisation, and everyone has up-to-date information about the performance of the company against its objectives.

4.4 Systems and structures are in place to code, and store knowledge and to make it available to those who need it and who can use it.

Criterion 5. Learning from the environment is encouraged and systematically evaluated. The results are assimilated and accommodated to the company's objectives and local constraints and opportunities.

Indicators

5.1 Inter-company learning is an accepted part of the company's overall policy.

5.2 Boundary workers act as environmental scanners.

5.3 External audits by private and public bodies to evaluate the company's performance are seen as valuable learning opportunities.

5.4 There are systems and procedures for acquiring and sharing information from outside the company.

5.5 Internal training is outsourced to external training providers when doing so offers an outsider's perspective on the company's performance.

5.6 Informal and formal networking is encouraged.

3 Organisational learning and knowledge sharing in the chemical industry: a case study from Germany

Following the above mentioned criteria several cases of organisational learning have been identified in those four large chemical companies who participated in our study (see Fischer & Röben 2002). In this section a case study is introduced which describes the participative production of the operations manual for running the chemical plant. The enterprise was intensely confronted with the impact of the company's policy of promoting job cuts using early retirement arrangements – the loss of experience and know-how in the shift teams due to the loss of experienced workers. In order to counteract this loss of knowledge and experience, a project was launched in 1998 in collaboration with the training division that envisages the participative production of an operations manual for all process stages of that plant. The operations manual became a kind of organisational memory for a major proportion of the know-how essential for operating the plant. It became the central basis of a skilling system and was linked to the salary system. Currently the concept is distributed to a lot of other plants at the site of company G.

However, the project had its origin in a particular plant – a so-called steam cracker. A steam cracker is the starting point for a chain of chemical production stages and outputs the first intermediate products (mainly ethylene and propylene) that are then delivered to other chemical plants and to the ethylene network system in Germany. As intermediate products, ethylene and propylene have to go through further production stages before they are made into the many synthetic materials that the company markets. The steam cracker produces on a continuous basis and is able to vary its production volumes or products within narrow limits only.

Learning at the steam cracker – Producing the operations manual by the work force

In the chemical industry standard operating procedures are determined and documented in plant-specific operations manuals. These manuals are of much importance as they contain knowledge which is needed for running the plant, complying with safety regulations and for trouble-shooting. Usually, these manuals are produced by engineers who have an academic education and often have constructed the technical installations of the particular plant in question. Those engineers, however, usually do not have acquired much experience in running the plant day by day. To our knowledge, it was the first time that normal shift workers were charged with the production of an operations manual for a rather complex chemical plant.

Drafting and editing the operations manual for the steam cracker is organisationally controlled. At regular intervals, a team comprising one beginner, an experienced worker and a moderator meet in a container near the workplace and draft the description for a particular process stage. On average, every team has three up to four weeks time for writing their particular chapter. The manual explains how each process stage functions, how it is operated and which safety instructions must be complied with. The team is also responsible for producing exemplary questions which will be used for a technical examination that is going to be executed with the help of the handbook. The entire operations manual consists of 35 single folders (each containing one chapter).

The team starts its work with the collection of all relevant material (i.e. technical drawings, flow charts, list of devices) and information about a particular process stage. After doing so they start writing the text at a meeting. Whenever they have finished a section they pass it to the shifts requesting comments and corrections. By the next meeting, the team tries to clarify anything they do not know by talking to colleagues on the shift, the shift foremen, the day foremen or even the works management. It can be stated, that a very intensive discussion about the function of technical devices and the operation of the plant takes place during the work of the team.

The greatest learning effect arises in joint discussions within the manual team and in discussions with experienced workers on the shift. The shift foreman does not usually send the excellent workers to the container where the manual is produced, because there are only a few very experienced workers on the shift. However, direct participation of shift workers ensures that the manual is easy to understand.

> "It's easy to understand because you yourself are doing the writing and there aren't many complicated words in it." (Shift worker interview)

Employees who were not involved in producing the manual also confirm that the text is easy to comprehend.

The learning that occurred when writing the operations manual is without doubt the most intensive form of learning. The very act of writing compels the workers to think very carefully and precisely about what actually occurs in a particular process unit. Most workers understand rather quickly how a process unit is operated or what its most important function is when engaging in these kind of questions, whereas during continuous operation there is a lack of opportunities and motivation to think about the plant in any depth. Writing the operations manual provided such occasion.

Producing the operations manual tends to be welcomed more by younger workers. Some of the elder workers, especially some masters (*Meister*), seem to consider the work involved in producing the operations manual to be a waste of effort as they do not see the advantage of working hard for fixing a kind of knowledge what they already have acquired and what they expect to be acquired also by the younger workers in the course of time.

Using the operation manual

The extraordinarily strong training effect in producing the operations manual might be seen rather as a singular event. In the beginning of our investigation it was not yet clear in which way the updating of the handbook would be performed in the future (today a team for updating the operations manual is vested). Within our empirical investigation we have therefore also focused on the normal and everyday use of the operations manual. Especially novices use this manual intensively who are extremely motivated due to the link between learning (respectively the success of learning) and the salary system (see next section). Because of the work-oriented content of the operations manual it is particularly used whenever work at a specific process unit has to be envisaged. As it is exactly described in the manual how a process unit is structured, and, first of all, how it has to be operated in particular situations, novices are able to prepare their work well with the help of the handbook.

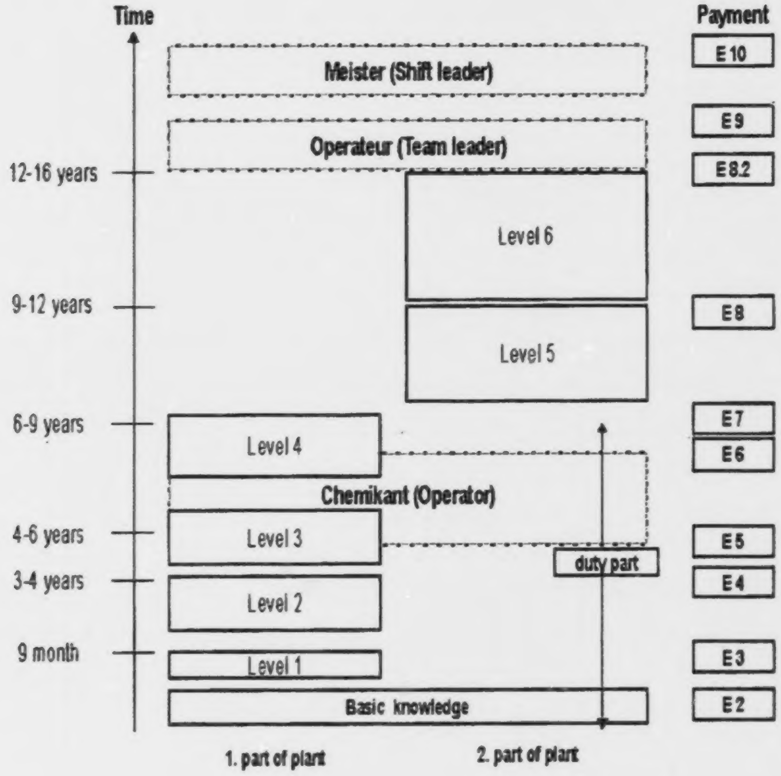

Figure 3: *The link between qualification levels and salary. E1, E2 etc are wage groups. Left scale: average time to reach this qualification level.*

In case questions arise concerning the use of the manual, users often contact the authors responsible for the description of a particular process unit. If mistakes in the manual are detected and amendments seem to be necessary then a master who is registered as responsible person for the respective section cares for the up-to-dateness of the manual.

The link with the wage system

Novices with vocations from outside the field of chemistry receive rather few money when being engaged by the company. The difference between this primary wage group and those of a skilled chemical worker is four to five wage groups. Since the operations manual was introduced there is the opportunity that novices raise one wage group in salary each time they successfully pass an examination (a kind of technical discussion). They are able to prepare this technical discussion very well with the operations manual as it contains exemplary questions (similar to the examination questions) for each qualification level. In former times the rise in salary was dependent on a judgement by shift- and day masters. Today workers may register to the technical discussion at the higher management level independently from the master.

Basic knowledge "Approach to the plant"	→ **Knowledge:** give information about, name → **Recognition:** to refer to, define → **Ability:** describe, assign
Basic program "Operate inside and with the plant/facilities "	→ **Knowledge:** Overview about some parts of the plant (steps of the process) → **Recognition:** Early recognition of causes (assumption) of irregularities in the process → Ability: Monitoring, "Approach to regulation and control"
Intermediate program "Operate with a complex plant"	→ **Knowledge:** Describing effects of regulation and controlling of the plant, the processes and the open- and closed-loop control → **Recognition:** Distinguish between reaction and consequence → **Ability:** correct description of irregularities, intervention and regulation
Extended program "Independent forms of practical planning and action"	→ **Knowledge:** Explaining complex connections inside the plant facilities → **Recognition:** Explaining preventative measures to avoid disturbance → **Ability:** Eliminate disturbances, measures of starting and shutting down the plant

Table 1: Taxonomy of training goals of the different qualification levels (Quotation from an operational document).

Each wage group is connected to a qualification level which itself is related to a taxonomy of training goals. The beginner uses the operations manual in order to get a general idea of the plant. He or she then reads the part of the text that gives an overview of the functioning of a particular equipment and answers questions from the operations manual which are related to basic knowledge.

Interpretation as organisational learning

Producing and updating the operations manual, as well as integrating it into the process of skilling workers, must be interpreted as an organisational learning process. Previously, the process of skilling shift workers primarily depended on the initiative of shift foremen and experienced shift workers. The organisational process of preparing and updating the operations manual implies that an important part of the knowledge of employees is added to the organisation's 'memory'. The skilling system, linked as it is to the payments system, provides organisational processes for distributing the knowledge stored in the various documents comprising the operations manual.

The process of writing and using the plant manual matches our criteria 1, 2 and 4, to some extent criterion 3, having its main emphasis on criterion 4 (knowledge creation and knowledge management):

- The knowledge about the plant which is necessary for direct operation is documented, generalised and assessed. This was to a certain extent formerly done only by engineers.
- The knowledge about the plant which is not immediately useful for direct operation but might be necessary in case of emergencies is also activated by the plant manual: On one hand, during the writing, when systematically all parts of the plant have to be considered; on the other hand, during the systematic examination which is organised on the base of the plant manual. Up to then workers did not have the opportunity for systematic reflection.
- By the participation of the shift workers in preparing the plant manual, they will be able to use all of the information sources of the company. In former times there was hardly an opportunity for the workers to come in contact with the department of documentation. During the preparation of the plant manual, the workers always have to collect all necessary documents.
- By the participation of the shift workers in preparing the plant manual, they will be able to use all of the information sources of the company. In former times there was hardly an opportunity for the workers to come in contact with the department of documentation. During the preparation of the plant manual, the workers will always have to collect all necessary documents.
- By the correction of the texts written by the teams, the workers from a certain shift

will be stimulated to discuss the concepts of controlling the plant, running the plant and the connectivity of the functions. In former times there was no occasion for such kind of discussions. The concepts of controlling the plant, running the plant and the connectivity of the functions were explained to the novices by the master or experienced workers. The novices had no other possibility but only to accept these explanations. By fixing the explanation as text of the operations manual, it can be critically re-examined. In former times it was very hard for workers to make this kind of consideration.

- Every team that has prepared a part of the plant manual was composed of workers from all of the shifts. During the discussions about the correct version of a text, the workers became aware that every shift has its own style to run the plant. In former times there was little communication among the shifts, so the workers from one shift considered their way to run the plant as the only possible one.

The mental models of the shift workers and the master about their plant and the way to operate the plant were changed through the process of preparing and using the operations manual. The concepts about the role of workers in the work organisation have been changed, too. For example, the female moderator of the teams reported in an interview, that at the beginning of the project angry shift masters complained about shift workers who were sent by themselves to the teams. The main point of the complaint was the awakened self-consciousness of workers who made themselves independent from the information flow controlled by the master. From then on workers regularly ask questions about technology and functions in the plant and they did not immediately trust the information given to them by masters and foremen.

If we call in memory that organisational learning in the sense of double-loop and deutero learning implies a structure created by the organisation through which individual learning is permanently stimulated, documented and evaluated, then a conclusion as follows has to be drawn:

In former times individual learning of novices in the steam cracker happened in an informal way and to some extent coincidentally. If novices were motivated to learn then masters answered their questions and stimulated them to continue learning if time and opportunities were appropriate. The transformation of this informal training process into a structured introduction to the knowledge necessary for running the steam cracker must be regarded a process of organisational learning. Of particular importance is in this case the link to the wage system through an examination (a "technical discussion" in the terminology of the company). Due to this link it became necessary to set up a taxonomy of training goals and to provide learners with a structure of contents within the manual which were oriented to the needs of the learners and not exclusively to the functionality of the technical installations. By the examination through the technical discussion it shall be ensured that learners have understood the contents of the manual. For this reason there are not any marks or grades as a result of the examination. The learner has successfully passed the examination if he or she could correctly report at least 80% of possible answers. Who has surmounted this hurdle will be rated in the next higher wage group.

For the preparation on the examination by means of the exemplary questions from the operator manual it must be made clear what is expected from the examinee. For this reason a discussion about the contents to be studied takes place at the steam cracker. In former times there were no need for such a discussion. Every master and every shift regulated the skilled worker advancement after their own criterion. The present examination system has moved this situation to a rather objective basis. The participation of all shift employees has contributed to this particularly. It was made sure that the correct contents are being examined. The evaluation of these procedure in the sense of an organisational inquiry after Argyris and Schön is dependent on how thoroughly the operations manual is revised by the work force. The operations manual is not only used for the examination, but as well for preparing real work tasks within the plant. It does not have to be expected, that the contents of the operation manuals and the contents which are needed for work, drift very much apart from each other.

The culture of the steam cracker

In the eyes of one of the works managers we interviewed, no major change has occurred in the way members of management treat the workers. Thanks to improved skilling of workers, however, he does expect certain impacts leading to greater independence of workers and more individual responsibility, although more in the sense that workers extricate themselves from management control than that the works managers change their own behaviour. Some of the works managers are described by some workers as unapproachable persons. Traditionally, leading managers in the German chemical industry were doctors of chemistry who valued a strict hierarchy and made sure that this hierarchy is respected by other persons.

Nevertheless, it must be noticed that there are changes in the corporate culture. In former times a project like the participative production of the operations manual was unfeasible, and the reason for this seemed to be rooted in the thinking of the managers. In their opinions, workers did not have the ability to write something like a plant manual. Such a task, they thought, could only be done by a graduates. Nowadays, workers write the operations manual by themselves and they do this with great success.

Quite obviously, the exchange of the leading works manager did not have much impact on changing the behaviour of the management level below. In workshops, some workers expressed criticism of the foremen, who failed to pass on much of their dissatisfaction to the management. These dissatisfied workers were obviously afraid of approaching the leading works manager directly. This is despite the fact that, at meetings in the control centre attended by all the workers, the leading works manager actually requested the work force to express their comments and critical remarks.

In the eyes of most of the work force, it is not a common practice that the workers consult the management directly, despite the fact that the work manager asked for comments and remarks. In former times the relationship between works management and the employees was regarded as not satisfactory, at least by a part of the work force. This is clearly evident in the cautious comments by various workers who said that the demands imposed by the works management were increasingly intensified with little consideration for human interests. This also led to an employee survey, which was evaluated according to the various divisions within company G, indicating a negative atmosphere in this particular plant.

The Training Officer in that plant considers it essential to introduce measures for building confidence between the works management and the shift workers. For example, he proposes that each shift should introduce 'consultation hours' in which the works management can get in direct contact with the shift workers, and not just communicate with them through the shift foremen. The Training Officer would also prefer to implement an established set of measures, between works management and workers, through which discrepancies between self-perception and perception by others could be explored.

Employee survey

In the employee survey, workers are given the opportunity to assess the leadership qualities of their works managers. The works managers than receive feedback on the results for their particular plants or departments. However, little use is made of this opportunity to identify potential for change. One interviewee noted, that the employee survey enables criticism to be vented, but provides little opportunity for initiating change. When a senior member of staff is assessed poorly, he can always justify his doing by saying that he is not the one who has to change or that he is not responsible for initiating change, but that this lies in the responsibility of his senior manager. The many levels of hierarchy foster a situation in which problems are passed on to others instead of being tackled.

In a particular works, the workers and also the foremen usually only know their immediate superiors. Only in very rare cases do they get to know other managers, such as departmental or divisional managers:

> "Well, we actually see little of any heads of department or heads of division. When we do see them, then something serious is going to change in some way or other, or something serious has happened. Then you see them, otherwise you don't see them."(Shift worker interview)

Knowledge management at the steam cracker

An important field of knowledge that has to be conveyed to as many workers as possible in a single enterprise concerns the causes for disruptions in production. In the steam cracker a large proportion of the knowledge available to the organisation about such disruptions and their causes was lost because experienced workers retired early. Early retirement by experienced workers has adverse impacts on the dissemination of knowledge during the shift. Because the remaining experienced workers are mostly deployed on management tasks, those who are remaining on the shift are often the ones who cannot teach much to the novices.

The experience of losing this knowledge was a factor that stimulated the participative production of the operations manual, which can be interpreted as corporate knowledge management. Reports on the most important accidents are integrated into the manual. The most important knowledge creation was the fixing of informal knowledge in documents of the organisation. Before this process of knowledge creation started, the organisation has not learned what the workers know, because the knowledge of the workers was not fixed in a form accessible for organisational measurements. Now, this part of workers' knowledge which is fixed in organisational documents is accessible for organisational measurements like the personal development system or the qualification system of the company.

However, there are still some barriers visible towards knowledge acquisition and knowledge management. For example, one interviewee who completed training as a chemicals operator outside company G is highly interested in regulation concepts as part of process control. In his opinion, the elder workers in company G have acquired knowledge about regulation concepts which enable them to act efficiently, but they are not able to communicate the background facts that explain the success of their actions. Their knowledge about chemical reactions, technical installations and the process control system was acquired in their daily work, which leaves little scope for more in-depth exploration of underlying causes and effects. Trained chemicals operators, on the other hand, had time during their training to familiarise themselves with process control principles and the functional principles in the technical field. The explanations given by elder shift workers are often based on experiential values that they are unable to explain any further and for this reason are dissatisfying for the younger, trained chemicals operators.

The informal exchange of knowledge is fostered by various activities, for example sports events. The works management supports indoor bowling and football. Within company G there are tournaments involving various works teams.

Learning from the environment

Operating a plant as complex as the steam cracker permanently confronts the work force with major or minor problems, the solutions to which accumulate in the course of time as experience-based knowledge of the steam cracker employees. For this reason, every works manager, every works engineer and indeed every employee is interested in how the typical problems faced in a steam cracker are solved by work forces elsewhere. Within company G experience is exchanged between specialists with steam cracker experience – an exchange that originated in the German site. This is where the first two company G steam crackers were built and a body of know-how amassed that was also used in building a steam cracker of company G in Belgium, for example. In 2001, during the large-scale shut-down in the German site, workers from the steam cracker in Belgium came to the German site to learn how the total shut-down can be carried out efficiently and which cleaning methods have proved to be particularly effective.

The involvement of experienced workers from the German site when building other steam crackers (e.g. the world's largest steam cracker is being built in the USA at Port Arthur in Texas), or when carrying out total shut-downs, enables these workers to gather further experience that greatly benefits the German site as well, because a steam cracker during normal operations provides much fewer opportunities for training than when constructing, starting or shutting down a steam cracker.

The workers who spent some time abroad on one of these projects tend to advance their careers, with some of them joining the shift management team, for example. In addition, because company G has at least six steam crackers, some opportunities exist for the work force to gain experience.

Collaboration between company G and other steam cracker operators is confined to safety issues only. For example, when a plant discovers that a certain welding seems to cause safety problems, then problems of this kind are communicated. Problems of a general nature and ways of solving them are not discussed with competitors, however.

In the German site, learning from the respective other steam cracker was fostered by merging the two control rooms. For the day shift foremen and higher levels in the hierarchy, both crackers are part of the same organisational entity. Workers may be swapped between the two crackers, but this is not for systematic reasons.

Almost all steam crackers in the world are subjected to benchmarking. In the so-called 'Solomon Study', the data for various parameters of steam cracker operation are listed:

> "And according to which criterion are the crackers compared?" "How many dollars you can squeeze out of it. The basic criterion, such as use, operation, personnel, production stoppages, availability, products, product range, what you get out of it, what you do with it, how much this is, what the ratio is between different product volumes, what the energy prices are, what kind of energy is used, and if yes, at what prices. So 2 kg – the report – is what comes out of it." (manager interview)

This study ranks the steam crackers and if one is given a bad ranking the works manager has to justify this. However, as the study mainly focuses on details that are financially interesting, it is not easy to explain good or bad performance on the scale. Whenever a steam cracker is designed, many boundary conditions are set that cannot be changed during actual operation. In particular, the size of a steam cracker is very important for efficient use. Older, smaller plants in Europe are competing with newer, bigger plants in Asia and America. It is not possible, on the basis of the Solomon Report, to compare different ways that the plants are operated, or other factors relating to work organisation at the steam cracker. From the economic perspective, only the number of employees per tonne of ethylene or propylene produced is interesting.

It seems that the steam cracker in the German site does not learn too much from other steam crackers, but they transfer a lot of knowledge to other steam crackers. These organisations are now constructing their own knowledge. The question remains open how the German organisation could benefit from the experience being accumulated by the other steam crackers. It seems that the German site has not recognised yet that they can learn from others. At least, they have not taken up any measures.

4 Conclusions

Altogether, it can be stated for company G that organisational routines and processes (e.g. standardised work procedures) are evaluated (the first criterion). The company provides help (Treffpunkt-i-procedures) for the check and the redefinition of the organisational procedures of the plant. This support and particularly the participative production of the operations manual has led to a real change and redefinition of organisational routines and procedures. However, it was not a result of an organisational inquiry to launch such a project, but the individual idea and decision of the leading works manager.

The second criterion (formal and informal learning processes are being evaluated and improved), is also fulfilled. First, a number of new learning processes have been inspired in the case described above. Furthermore, the steam cracker experiments with new forms of learning to find out the adequate one. This is the explicit goal of the project "active learning" where the trainers of the steam cracker learn how to conceptualise and to perform work-related teaching methods, and the trainees are getting acquainted with different types of learning methods. A remarkable project is the participative production of the operations manual. This project fulfils the criterion the best.

The third criterion (transformations are occurring in the culture) is fulfilled only to a certain extent. On one hand the traditional hierarchy still exists and leads to problems of communication and co-operation between management and work force. On the other hand a more implicit change in culture can be recognised: There is an awakened self-consciousness and there are improved competencies of workers

The fourth criterion (knowledge is being created within the organisation, at different levels and is being shared within the organisation) is strongly fulfilled. The knowledge for the running of the steam cracker is created by the workers. Through the qualifications system based on the participative production of the operations manual, this knowledge is shared within the organisation.

The fifth criterion (learning from the environment) is fulfilled only to a minor extent, as some possibilities for learning from the environment are used by the steam cracker, however not in the case of the handbook project. Also the above mentioned actions (like exchange of personnel) cannot be regarded as measure of organisational learning as there is no intentionally created and systematically controlled relationship to 'learning from the environment".

The development and use of knowledge within a company has always been a cause for dispute in regards to its usefulness for the individual or the company respectively. The concept of the learning organisation interprets this dispute anew. Our findings lead to preliminary conclusions as follows:

- The case described meets the criteria 1, 2 and 4 which were suggested in the theoretical framework of the OrgLearn project as important for organisational learning:
- In the case described the main emphasis lies in the provision of an organisational structure for knowledge creation and knowledge sharing. The knowledge to be created and shared is what we call work process knowledge: knowledge about the whole labour process within the factory including reflection on practical and theoretical knowledge that might be useful for work (Boreham et al 2002).
- There is an increase of self-organised learning and a reduction of personally controlling and determining learning processes by masters and foremen. Learning processes are on one hand more independent from personal control (by middle managers), on the other hand more objectified through manuals, procedures and regulations, however not eliminating partial self-organisation. The content of learning is oriented towards the running of the plant, combined to some extent with career opportunities. The content of learning is not oriented towards job descriptions and the range of vocational competencies which are defined by the German "Beruf" (cf. Fischer 1998).
- Processes of organisational learning were stimulated by a remarkable reduction of personnel and a loss of experienced workers. Organisational learning can be regarded as an attempt to compensate the loss of know-how. In particular, measures of organisational learning are taken up in advance to protect the company from a loss of know-how that might happen in the future.
- Knowledge which formerly belonged to the individual worker or a group of individuals is objectified in two ways: It is objectified through a process of generalising individual knowledge and it is objectified through artefacts – means by which knowledge can be stored in a "memory" of the organisation. It is not yet clear to what extent organisational learning may support an outsourcing-and-insourcing policy (Mariani 2002) and to what extent the individual worker benefits from processes of organisational learning he is involved in, especially if he is leaving the company.

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"The French APEL system Rationale and Philosophy: From Social Promotion to Individual Survival on the Labor Market" :

the APEL Stakes in the logic of Competence Model » in France and lifelong learning perspective

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Introduction

I will just introduce briefly the origins or genesis of the APEL philosophy or rational, especially in the French context which differs from the UK one. This presentation, actually, could be untitled :

"The APEL Rationale or Philosophy:

from social promotion to individual survival obligation on the labor market"

First, I have to say that the APEL rationale is strongly articulated with the concept of "competences" and its evolution in discourses that I could characterised through 3 steps [A B C]:

[A] First, this notion of competencies in France came out first in the 70 in a social debate in a context of raising level of education and growing demand of skilled workers while the work organisation's was still based on a taylorisation frame.

So, workers were complaining and fight against the fact that employers were only paying "the qualification required for the job" or the qualification attached to the "job" but not the "competencies developed and used " by the person in his work In a short cut, employers were paying the prescribed tasks and not the real work done. And that the reason why the employees claimed.. and that's in that context that the notion of "competencies" appears.

Also, in that context, was voted the 1971 law call "the Continuing Vocational Training law " which obliged companies to pay at that time almost 1 % of their wage bill to allow employees to access to training and this law was also set up **especially to allow social promotion**, in a egalitarian perspective.

[B] Then, the second step, refers to the change for companies of competition environment, what was describing yesterday Stephen Stoer in his keynote, which can be characterised briefly by a raising level of competitivness and requirement, more flexibility, a raising responsabilisation of workers in their activies, and now raising standard of work efficiency.

That is in that context that employers try to use this notion of competences

to establish a new carrier management model switching from the "qualification model" to the "model of competencies".

This model of competencies emerges as a unbalance new workrelationships between workers and employers.

With behind that model the employers' wish to break the "qualification grid" system established after the second world war by unions and through collective negociations and bargaining.

Because, this model of competencies operates a transfer from the qualities required on the job toward an assessment of individual qualities..

That is to say this model is focused on individual competencies, obliging people to take themselves in charge their own carrier promotion trajectories and push themselves to bargain their own salary in a face-to-face annual individual interview with employer (pushing away the union protection..and collective bargaining).

And as Prof Stephen Stoer was pointed out yesterday, in such a model, the less skilled workers, or the less powerful or less autonomous workers will be trapped... and rapidly excluded from promotion..

So, to respond to this model of competencies the construction of new benchmarks was a challenge Because they would have to be validate and recognised in a larger space than the companies places and that the aim and purpose of the APEL system.

In sum, it turned out that from a social promotion APEL rationale, APEL system becomes more and more crucial and a stake for individuals : an kind of individual survival obligation to avoid to be trapped or excluded...

[C] The APEL is therefore a response to that challenge and that those individual stakes and accreditation of experience issues which were also raised by the UE commission, boosting, as a third step, the notion of competences especially in the EU white paper focused on lifelong learning for all.

And then I would like to conclude : regarding the different societal organisations which prevails in Europe and challenges the construction of an ideal unique APEL system but nevertheless reinforces the needs of a APEL system clarification at least.

If the APEL rational evolves in France through the different steps of the "competence" notion development, it emerges in Europe with different rationales linked to the different societal organisations and the different national qualification and certification systems already established and their different degree of legitimacy and plasticity ; which explains that its construction is not easy and differs from one European country to another. And emphasize the challenge to build a methodology of transforming this APEL in ECTS in the UE different countries..

Context of Appearance and Development of the concept of Competence ? - slide 1.1

- **The context of appearance**
  - **Increase of scholar level**
  - **Increase of skilled workers**
  - **In an Taylor work organisation**

Context of Appearance and Development of the concept of Competence ? - slide 1.2

- **Shift and changes affecting companies context**
  - **Increase of the competition level,**
  - **Increase of Workers responsabilities**
  - **New efficiency work standard**

Context of Appearance and Development of the concept of Competence ? - - slide 1.3

- **The lifelong learning perspective**
  - **Construction of the qualification et lifelong learning schemes**
  - **High mobility in jobs**
  - **Diversity of work relationships**

➢ **Index of new production challenge**

➢ **Index of new bargaining force between employers-employees**

From the « qualification » to « competencies » models - slide 2.1

- **The qualification model**

- **definition of the work and the tasks, correspondance with a level of diploma and a wage ladder, defined through a classification grid.**
- **Qualifies the position versus the person**

From the « qualification » to « competencies » models - slide 2.2

- **The logic of competencies management feature**
  - From a job and position's quality definition to the individual characteristics ones.
  - Differences between the « professional » logic and the « competence » one : the extent of the individual quality validity
  - Needs to enlarge and broaden the competences validity extent
  - Condition to avoid intern market regulation
    - Carrier prospect not any more linked to jobs vacancies but individual competencies

From the « qualification » to « competencies » models - slide 2.3

- **Stakes and Individual Challenges :**
  - Individualized work-force management
  - Individual Face-to-face individuel with the hierarchie via an annual interview
  - Workers Self management carriers track and prospect.
  - In an economics slowdown: way to restrictive competencies management versus personal development encouragement
  - Inequities and inequalities among workers

From the « qualification » to « competencies » models – slide 2.4

- **Stakes and collective challenge:**
  - Lost of collective indexes and references
  - Destabilization of the Union roles

➢ **Risks**

  ➢ « competencies models » reduced to a logic of economic aleas management model : an economic tool ajustment

  ➢ Weak contribution to ensure and motivate individual worker carrier tracks

Attempt of new references re-construction – slide 3.1

- The difficult construction
  - – Competence Paradox :
    - « only recognised in situ »,
    - « built at the same, beyond the job
    - Deals with individual transferable competencies, built through experience ».

Attempt of new references re-construction – slide 3.2

- **A construction linked with societal framework**
  - – Typology (F. Lefresne) :
    - More the Vet system is regulated with social partners and strong social and VET identities, more legitimate is the production of competencies « standard » among the existing qualification system (North European countries and Germany characteristics)

Attempt of new references re-construction – slide 3.3

- – More the debate on competencies is independant, the Vet system is deregulated (and broken) (UK case)
- – If the system is not hard structured,or characterised by a slow implementation, the core question remains the production of collectives standards (Spanish case)

Attempt of new references re-construction – slide 3.4

- France : characterized by a qualification system fragilized and a work organization questions
- Difficulties to build and negociate new references and collectives indexes
- Competencies debates more and more a public politic matter (work and training policies)
- Competencies : a challenge of public policies and concerning both, employed and unemployed people

Learning Entrepreneurs

Learning and innovation in agricultural SMEs

Draft paper for the ECER conference
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1 Introduction

This contribution is targeted at agricultural entrepreneurs organising their learning in order to become innovative and learning enterprises. Within small companies, the entrepreneur has a pivotal role in the innovative process: the entrepreneur is the professional learner. In high-tech sectors in particular, as Dutch agriculture can be characterised, this learning and innovative capacity is essential for economic survival.

Innovation is a complex process, based on interactive network learning and processes of trial and error on the shop floor. Small companies are depending on external knowledge infrastructures for effective innovation. In the middle of the former century, the agricultural knowledge infrastructure in the Netherlands was organised around a linear innovation model, in which research outcomes prescribed the way farmers had to produce. This resulted in one of the most successful agro-systems in the world; the only problem was its dependency on European and national protective policy. Under pressure from the WTO (the world trade organisation), Europe has to leave this protectionism and Dutch agriculture has to become market-led. Successful farmers have to become innovators themselves in stead of implementors of science-led governmental policies.

Learning and innovation as major parts of entrepreneurship are central in this contribution. How do farmers learn and innovate within a market-led agriculture and how should governmental policy look like to support and facilitate innovation, avoiding the pitfall of protectionism? In the first paragraph we sketch the development in the Dutch agriculture knowledge system, followed by a theoretical paragraph on innovation and learning. In the third paragraph we present the results of two research projects in which we have looked at learning processes of Dutch farmers related to innovation strategies. The last paragraph deals with some conclusions and recommendations for further research.

2 Developments in the knowledge infrastructure for Dutch agriculture

Within Dutch agriculture, links between the educational system and the economic system have existed ever since the emergence of agricultural education during the years around the turn of the 20th century. During the decades following the Second World War, these links developed into a system: the OVO triangle (Onderzoek – Voorlichting – Onderwijs, in English, Research – Extension – Education). The logic of the OVO triangle is based on the 'scientification' of agriculture, the ongoing reorganisation of agricultural practices, according to models designed by the agrarian sciences (Van der Ploeg, 1996). These models were delivered to farmers by an extensive government extension (information) service and a separate educational system. The system was legitimised by the linear modernisation paradigm that dominated Dutch agricultural policy. The central notion of this policy was that small and inefficient farmers should disappear, and large, promising farms - the so-called vanguard farms - had to be supported (by import protection, export subsidies and guaranteed prices). Entrepreneurs (in agribusiness and farming) derived their parameters largely from an agricultural policy supporting generic new technologies to enhance productivity (Van Dijk and Van der Ploeg, 1995).

The OVO triangle proved its value, as it contributed considerably to the success of Dutch agriculture, making the Netherlands one of the largest 'agro-powers' in the world. The institutionalisation and success of the OVO triangle has been described by various authors (Vijverberg, 1996; De Bruin, 1997). However, this model is no longer so successful, as a result of recent developments. One important development is the recognition that "the practice of farming is not to be understood as a more or less linear derivation of the 'logic' of the market, or as a straightforward application of external technological designs. Markets and technology create specific room for manoeuvre that allows for differential positions" (Van der Ploeg and Saccomandi, 1995: 15). Empirical studies by Wageningen University show a variety of strategies, based on rational choice, which ensure a reasonable income. This recognition challenged one of the major principles of the OVO-triangle - that there is one 'best' farming practice - and therefore the need to transform the agricultural knowledge system.

This need for transformation has been strengthened by economic and socio-cultural change. In the 1990s, Dutch agriculture was faced with a severe crisis. Due to WTO pressure, the European Union was forced to reduce the economic protection of agricultural markets, which led to deteriorating incomes in the sector. The crisis was aggravated by growing public concern on health issues, increasing environmental awareness in European society, combined with serious food production scandals (see the recent disasters of BSE, swine fever and foot-and-mouth disease). Moreover, in the 1990s, there was a growing awareness that modernisation had reached its limits as the negative consequences of this strategy became evident:

- overproduction;
- a continuous fall in the level of agricultural employment; and
- increasing social demand to produce food without environmental, health or animal-welfare scandals.

Policy-makers, sector representatives and scientists agree that structural changes in the current mode of production are needed, i.e. farmers should produce for a more competitive market and meet the growing public demand for quality-oriented and environmentally-sound production. To be able to meet these demands, farmers need to re-orient on social and economic incentives. The latest policy document from the Dutch Ministry of Agriculture (2000), emphasises the necessity of stimulating `modern agro-entrepreneurship'. According to the Ministry, the two main conditions of modern entrepreneurship are economic autonomy and socially sound management. This new policy orientation thus no longer legitimises the need for an extensive government-supported OVO triangle. During the 1990s, a large part of the OVO triangle privatised: knowledge was no longer considered to be a public good that should be provided free of charge by government services.

3 Learning as basis for innovation

Innovation is important for the competitiveness of enterprises and industrial sectors. In the 1920's Schumpeter (in Kleinknecht, 1994) formulates the process of creative destruction, in which enterprises with old-fashioned products were ousted by enterprises with new products. Innovation and technology development are the main tools for surviving this dynamic process. As the design of the OVO triangle shows, national and European policy-makers believe in massive investment in technically-oriented research programmes as a major impulse for innovation in industrial sectors. The production of new knowledge and technology is the prime target of these programmes, which are built on a firm trust in the usefulness of the results of research for companies. A linear model (from research, through technology development and dissemination activities, to application on the shop floor) forms the main line of thought in these investment programmes. In this perspective, the learning needed on the shop floor can be characterised as adaptation to new technology.

In practice innovation is by no means a linear process, following a path from basic research to applied research and further to the development and implementation of new processes and new products (cf. Kline and Rosenberg,, 1988). On the contrary, it is characterised by complicated feedback mechanisms and interactive relations involving science, technology, learning, production, policy and demand (Edquist, 1997). The innovation process can be regarded as a learning process at organisational level. This becomes clear from the vocabulary industrial scientists use to describe innovation. They are working with concepts, such as "Organisational learning" and the "Learning organisation". Organisational learning is a process that occurs when learning results of members of the organisation are profitable for whole organisation (in cases of (successful) innovations). The learning organisation is an organisation that creates the conditions to enable its members to learn. Or as some emphasise, an organisation where employees perceive that those conditions are created. (Weick, 2001) An important characteristic of a learning at organisational level is alignment: a group of people functioning as a whole (the shared vision becomes an extension of the personal visions of its members (Senge, 1990: 234-235). According to Senge (1990: 236): "team learning is the process of aligning and developing the capacity of a team to create results its members truly desire."

A central characteristic of innovation is creativity. Innovation involves the solution of ill-structured problems, requiring a creative solution (Dosi, 1988). But creativity alone leads to an invention and not innovation (an invention only becomes an innovation when it can be replicated reliably on a meaningful scale at practical costs (Senge, 1990: 6). Hurst (1995) emphasises that in order to survive organisations need to combine the learning and the performance loop. New practices in an organisation created in the learning loop have to be transferred to a performance context to be of use

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for the survival of the organisation. The learning loop is characterised by action outside the context, the performance loop by action within the context. Thus, innovation requires both first order (in the implementation phase) and second order learning (in creative phase).
Any innovation process thus involves both a creative and a performance phase. Therefore the central issue for an innovative firm or learning organisation is combining `exploitation' and `exploration' (Nooteboom, 2000). Exploitation means that people and organisations try to use their available competencies and resources efficiently, in order to survive on the short term. Exploration means that people and organisations aim to discover and develop new competencies, in order to adapt and survive on the long term. He argues that these dynamics can only be explained by facing the fact that in economic systems people construct mental or other models of nature and markets, with which they develop speculative arguments, based on experience, about possible futures and possible effects of innovative actions. They think, communicate and learn. Therefore, we should turn to theories of knowledge, learning and language. (Nooteboom, 2000).
It is the people in the innovative firm that learns. In small companies, such as in the agricultural sector, the entrepreneur has a crucial role as he has vital influence on the development of his company. In order to ensure the economic survival of his firm, he needs to interpret and anticipate on changes in the socio-economic environment. Through this learning process he shapes an innovative strategy for the company. Although it is the individual who learns, learning is not a purely individual process. Individual learning should be viewed, not as learning utterly naked of social contexts, influences and participation's, but as learning in which the factors of social mediation have relatively lesser than greater presence (Salomon and Perkins, 1998). In innovation processes knowledge and technology are exchanged within the networks of collaborative companies and institutes. Companies need to collaborate with other companies and knowledge institutes. This is especially the case for small and medium-sized companies, because they do not possess large internal knowledge sources. For effective innovation, small and medium-sized companies have to use external knowledge sources.

The external knowledge context is complex for SMEs. The entrepreneur or employer, with his or her skilled employees, is involved in problem-solving and innovative processes. In the first instance, he looks for internal solutions; but very soon, external sources will be used too. On the one hand, professional journals, financial advisors, suppliers and customers will bring in new knowledge, either deliberately or accidentally, whereas, on the other hand, companies will be continuously looking for new knowledge sources. An interactive exchange of knowledge will thus develop around internal company processes. The enterprise is embedded within an expanding knowledge space. The knowledge space surrounding companies is multidimensional, in which at least three dimensions can be discerned: the product chain, the professional sector and the socio-economic region:

- The product chain dimension points to the relevance of user-producer and producer-buyer relations. Enterprises exist within product chains. They need raw materials, tools and machinery to be able to produce their products and services, which, in their turn, should be tuned to the specific needs and requirements of their customers. Chain management is an important new field of business management, focussed at inter-company relations: product accountability, quality information exchange, logistics for transportation and stock-keeping are major subjects in this field. Knowledge development and collaborative innovation should be part of chain management: sources of innovative activities are not always located within the producing enterprise.
- The sectoral (or professional) dimension indicates the exchange of knowledge between competing companies. In many cases, common interests exist, pushing competitors into collaborative, innovative activities. Based on co-operation between companies, sectors should be able to build sector-bound infrastructures for technology transfer and training policies. Sectoral challenges to facilitate innovation and learning processes are: establishing preconditions for collaboration between competitive enterprises in the field of training and innovation, building future-oriented monitoring systems for technological development, building support systems for company-bound innovation and training, defining key competencies for skilled workers and entrepreneurs, and creating sectoral ownership for innovation and training systems.
- In the spatial dimension, knowledge exchange is seen as a process between companies in the same region. Direct contact through observation, discussion and shop-floor visits is an important feature of knowledge exchange. Morgan (1997) emphasises the importance of creating learning regions,

analogous to the concept of learning organisations, such as building up collective learning capacities between geographically-related enterprises and regional infrastructural provisions. Strong industrial districts seem to be characterised by learning interrelations between enterprises. Other emerging regions are characterised by chain relations: the exchange of innovation and information is related to purchasing and selling activities. These kinds of learning networks are strong, because of their protective impact on economic activities. The challenge for local authorities is to establish labour market policies which will lead to high-level learning potentials and create networks of fledgling entrepreneurs as a part of their economic policy. Innovative training provisions could lead to an improvement in innovative capacity within regional economies (see Cook et al., 2000) and by so doing, give an impulse to regional economic development.

The innovative entrepreneur is a learning entrepreneur

In conclusion, innovation can be seen as informal learning processes, in which social networks play an important role. Workers learn by sharing knowledge in the working team, and employers learn by creating networks of colleagues and advisors. Within the traditional OVO-triangle, farmers had to follow the prescriptions from the research agenda by adaptive, programmed learning. The 'neue Combinationen' from evolutionary economics (Schumpeter's basic concept) should have a counterpart within the learning theory: creative learning (Ellström, 1994), expansive learning (Engeström, 1994) or Q-learning (Revans, in Marsick and Watkins, 1990; Q stands for learning through questioning, as opposed to P, for programmed learning); these are forms of learning in which the learner is free to question the definitions of learning tasks as posed by the context: entrepreneurs should be able to define or redefine the innovation task, based on the impulses they receive from their networks. (agricultural) entrepreneurs have to develop towards flexible expertise (cf. Feltovich, Spiro & Coulton, 1997), based on a complex worldview (Feltovich c.s. speak about World Two, which is continuous, simultaneous, organic, interactive, conditional irregular and multiple, in contrast to World One, which is static, sequential, mechanistic, universal and linear). Especially entrepreneurs should be able to detect the irregularities in the world around them and to balance in between stability and flexibility.

4 Research on learning of Dutch agricultural entrepreneurs

As described in section 2 agricultural entrepreneurs nowadays face dramatic changes in their socio-economic environment. To deal with the complex problems these changes bring about they go through profound learning processes. A process in which they are no longer supported by an extensive and well-functioning knowledge system. This leads to the question how do farmers organise their own learning processes in order to deal with the dynamics of their socio-economic environment. To answer this question Stoas Research has conducted two research projects.

- Gielen and Jager (2001) have studied the professional learning and searching processes of agricultural entrepreneurs. The general idea is that permanent antennae focused on external developments are a prerequisite for the survival of an enterprise. In this explorative study, nine farmers were interviewed in depth on their activities in searching for company-relevant information. These nine farmers were not selected for a specific innovative stage: they were just practising farmers. However, almost all the interviewees had been involved in important innovations during the previous year.
- In a follow up research project, Hoeve and Drost (2002) focussed on learning of farmers in relation to their innovative strategies. In this study information is gathered through a survey amongst 752 agricultural entrepreneurs, followed by 15 in depth interviews aiming to further clarify and illustrate the survey results.

The following sections present the results of these research projects.

Knowledge sources and learning processes of entrepreneurs

In general, farmers are actively looking for new information and knowledge. Three main reasons for this behaviour could be discerned in the interviews: general orientation, realisation of enterprise goals, and solving of techno-organisational problems.

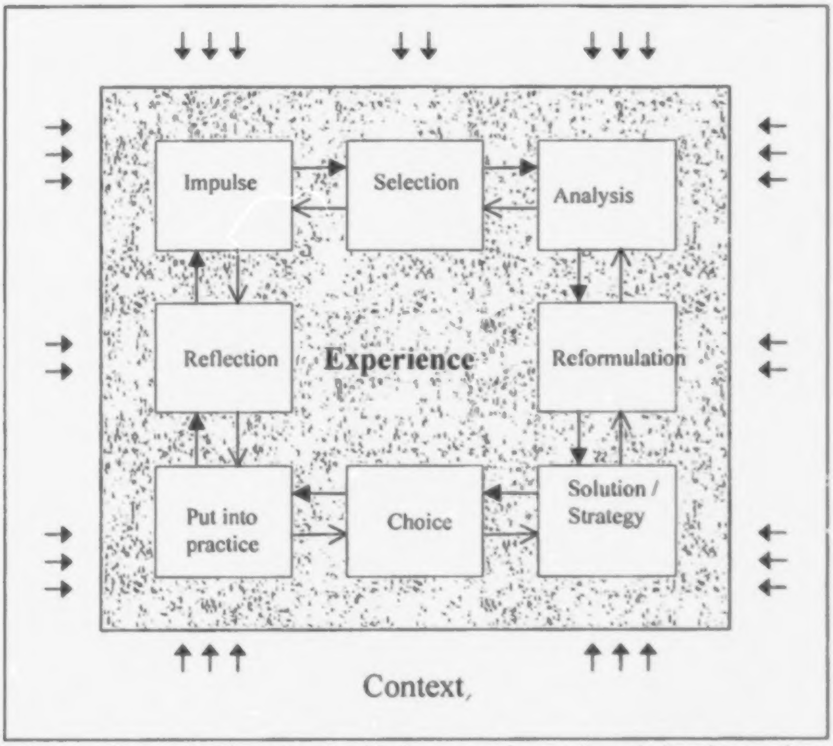
- With regard to general orientation, these entrepreneurs try to keep their eye on developments on their markets, within their sector and in society in general. They want and need to know what is happening in their economic environment. It helps to define a strategy for the enterprise and gives information on problems within the company, which have not been detected yet. All interviewees were aware of the need for an open mind about external events. ;
- specific information is gathered on technological and market aspects. For example greenhouse farmers need daily information on price developments at the auction and specific technological information for the improvement of processes and products;
- unlike the first two reasons for seeking information, problem-solving activities are narrowly targeted. Journals, networks and databases are used to look for specific solutions. For technical problems, the knowledge infrastructure offers rather good information; for marketing problems, the interviewees reported that they had to search much more independently;

Besides these three reasons, most of the interviewees also mentioned that they were just eager to know about new developments: they have a 'natural' tendency towards learning activities. There is however also a far more 'negative' reason to seek information and knowledge: a wide perspective on available information and knowledge is needed so you won't miss any crucial information. Missing information is seen as a real threat but at the same time the entrepreneurs know the can't follow the whole scale of variety in information.

The most important sources of new information are specific journals, fellow-farmers, competitors, suppliers and customers. These sources were mentioned as very reliable. Training, extension and fairs were also mentioned, but not considered very useful. Research and technological institutes were rarely mentioned: the 'mental' distance is too great. Information was looked for both locally and internationally, depending on the problem. Most of the interviewees are not afraid of looking internationally: they have a rather professional way of searching for new information.

Networks of colleagues, based on a sectoral perspective, were mentioned as one of the most powerful sources of innovative information. Participation in these networks is seen as a normal activity. Participation is logical and necessary. Farmers use different networks for different types of knowledge fields: financial, social, technical and political. Long-lasting network contacts are mostly quite informally organised. The information exchange is based on a gentlemen's agreement: you only can participate when you are seen both as a recipient and a provider of knowledge. Entrepreneurs are seen as a source of powerful information and knowledge, and they are aware of the economic value of that knowledge. In former times, farmers' networks were quite publicly organised, because of governmental financing of these activities. Recently, in the last decade, some of these networks have turned into closed organisations: the competitive advantage of the exchanged knowledge is too great for open publicity.

Figure 1: The entrepreneurial learning cycle, (Source: Gielen & Jager, 2001)



Almost all the interviewees had been involved in important innovations during the previous year. Some of them were early innovators, others were adopting innovations from elsewhere. The product market was the most important impulse. Innovations were technical, market-oriented and socio-organisational. (In this last category, for example, father-son successions are solved imaginatively). Internal solutions were sought first, before looking externally. One interesting observation was that important learning experiences were not gained from theory (technology, new knowledge), but from learning processes (new ways of finding innovative information). There was also an interesting notion afterwards that not all problems had been seen correctly; professional experience seems a relevant predictor of this.
Sources close at hand were used the most frequently: suppliers, colleagues and journals. Employees were not often seen as an important source of information: knowledge is concentrated in the entrepreneur.

The interviewees mentioned a kind of circular problem-solving strategy. In the first circle, some stages were skipped (e.g. analysing the problem or formulating solutions). The first learning cycle can be characterised as trial and error. Later on in the process, all stages were used more frequently. Time and money are crucial restrictive factors for the way learning cycles are finished properly.

Surveying problem contexts
In the follow-up research project 752 farmers are questioned through a telephone survey to gather data on innovative activities and the use of knowledge sources of agricultural entrepreneurs. A structured survey is not a good research instrument to gain insight on learning processes, as it does hardly provide possibilities to built in the profundity necessary to get grip on complex issues like learning processes. The data gathered does, however, give us information on the frequency farmers are involved in complex change processes (and thus need to learn) and the nature and frequency of contacts with others in the learning process.

The survey reveals that farmers find it important to broadly orientate on socio-economic developments. The following table shows the percentage of the farmers that actively orientates on the different relevant developments

Table 1: fields of orientation

Orientation on developments	*% farmers*
Marketing & sales	64
Consumer trends	63
HRD	39
Technology	75
General Social developments	88
Agricultural policies	87

The results of this survey confirm the observation of the explorative study that farmers in general are involved in innovative activities. Almost 56% of the entrepreneurs can name an actual innovation he has implemented on his farm. Most innovative activities undertaken serve to improve the production process through introduction of new technology, improvement of production circumstances (for example greenhouse climate, housing of animals, working conditions) and introduction of new methods of production. Also the changeover to another subsector in agriculture is mentioned al lot. The nature of the innovative activities implies that entrepreneurs consider an activity an innovation if it is new for farm, even though it is not new for the sector or market. So in general the activities undertaken are not innovations in the classical sense of the concept. Cobbenhagen (2000) points out that innovations that are only new at company level have a major impact on the organisation of production. As a consequence, the workers need to adapt to a new production situation and thus go through a learning process. This is confirmed by in depth interviews we did afterwards to clarify some of the survey results. The interviewed entrepreneurs make clear that any renewal activity, innovative or not, still call for an intensive learning process. The survey also shows that only 18% of the innovating respondents answers that the innovation was externally developed and is implemented without any modifications. In general, innovative action thus involves creative thinking, in the range from creative new ideas to creative adaptations of existing technology. On basis of these results it seems justified to conclude that the majority of the farmers is involved in complex learning processes.

Learning is a social process: interaction with significant others is an important source of learning. In this section we review the survey results on contact with others in the learning process farmers go through in undertaking an innovative activity. In general, the results show that innovation is a social process, in which knowledge is exchanged within the networks of collaborative companies and institutes. Almost 58% of the innovating farmers cooperate with others. The most important co-innovators are colleagues and suppliers (both parties are mentioned by 45% of the innovating respondents).

Next we try to specify the nature and frequency of the contacts for the different stages of the learning cycle (see figure 1). The results show that in the first stage of the learning cycle (observing the impulse) farmers try to take a broad view. The next step is the idea generating phase in innovation. This entails the next four steps in the learning cycle: selection of the impulse, analysing, reformulation and strategy formulation. 44% of the innovating entrepreneurs say that the idea for innovation is developed in co-operation with other parties. We asked the farmers who they consult in decision making on operational and strategic decisions. The results are shown in table 2:

Table 2: contacts used in innovative decisions

Level of decision *Contacts*	*Operational % farmers*	*Strategic % farmers*
Colleagues	74	58
Supplier companies	74	53

Buyers & customers	56	42
Bank		74
Centre for Innovation	9	10
Extension services	43	39
Institutes for applied research	31	20
Research institutes/universities	32	22
Agricultural VET-colleges	19	10
Others	28	31
No answer	1	2

In general, we can conclude that farmers are eager to have a broad perspective and are open to spot technological, socio-economic and political changes and chances. However, they limit their information sources mostly to colleagues, direct partners in the production chain (especially suppliers) and for strategic vision the bank. In all stages of the learning cycle they seem to cling to strong contacts; they hardly make use of weak contacts which is in the innovation literature seen as an important source of innovative ideas (cf. strong links and weak links for innovation in Elfring, 1999).

Back to the process of learning: in depth interviews

In the last stage of the follow-up research we interviewed 15 farmers to gain insight in the way they organised their learning process in an innovative activity. The results confirm our conclusion based on the survey that farmers are keen to broadly orientate themselves on a wide range of socio-economic developments but consult a limited number of sources. The farmers use specialist journals to stay up to date of the general developments in technology, policies, consumer trends and societal trends. Moreover, they use the specialist journals to filter the broad flow of information on what is relevant for the sector and/or their own business (first selection of impulses). Next to go through the learning cycle to choose the impulse they will take further innovative action on. This is a fairly unconscious process that, as one of our interviewees stated, takes place "while you are working". Working refers to activities related to the actual production process (such as milking, harvesting, etceteras). However, there seems to appear a division between small and large companies. In the large companies the entrepreneur is no longer bothered with practical executive tasks, and therefore has the time to explicitly think about the consequences of ongoing developments for the own company.

In this process the ongoing developments on medium term are interpreted in consequences for the position in the market of the own business, The entrepreneurs interviewed are eager to maintain (or slightly improve) their current market position, and thus try keep up with technological possibilities, comply with requirements set by markets (in terms of quality of the products) and society (such as demands on animal welfare and environmental legislation). Four respondents can be characterised as frontrunners, but most of them do not strive to be far ahead the others; that strategy is considered to be too risky. In other words, innovative action is not so much inspired by strategic vision and aimed at novelties but determined by the need to balance between risk and continuity.

In this stage the learning cycle is not followed perfectly: they go back and forward and steps are skipped. One of the interviewees points out this process can take years.

In this stage colleagues and advisors form supplier companies are important to exchange knowledge. Study clubs - learning networks with colleagues - used to be very open in greenhouse farming. They are changing, however, into more closed systems for knowledge transfer. Since products used to be sold by public auction, there was not much competition between companies. Nowadays, more growers have contracts with supermarkets, which has lead to the emergence of grower corporations with more closed knowledge systems. Several interviewees consider this a bad development. One of them expresses his concern: "Growers in a corporation in the end all perform according to standardised procedures. We all do and think the same and there is not much to left to learn form each other." To avoid being blinkered by the focus of one's network, the frontrunners participate in several networks. Once decided what action to undertake the entrepreneurs are very conscious of their learning. Still, the respondents go fore and backwards through the learning cycle, but in this stage these are conscious moves. Colleagues are often partners in innovation (especially in the grower corporations) and therefore partners in learning. Other important learning contacts are partners in the production chain (especially suppliers) and the bank (as financing partner).

A striking observation is that internal sources of knowledge are hardly used. Even though in horticulture 7 out of 9 businesses employ 10 people or more. Only family members and co-entrepreneurs are consulted in decision making and problem solving processes. One respondent was aware of the potential of using the knowledge of the workforce. We can conclude that agricultural entrepreneurs are very capable of organising their own learning process, but lack the competence to organise a learning process at organisational level.

Based on the interviews we can conclude that really innovative entrepreneurs, the forerunners, distinguish themselves from the followers because: they create the organisational preconditions (especially time) to consciously organise their learning and because they make sure to participate in different networks.

5 Conclusions: learning as entrepreneurial craft

Entrepreneurship seems to be synonymous with learning. The results of both research projects show that agricultural entrepreneurs have an open mind for new knowledge and developments, and they are eager to organise their knowledge networks. They mention a constant flow of learning activities and they have to select actively which external impulses to follow. In this selection process, and also later on in stages of the learning process, the farmers relied on the opinions of the entrepreneurs in their network. Naturally, solid links within old networks were more important than weak links in new developing networks. This created a dilemma between routinising learning and the need for new, surprising impulses. There seemed to be individual differences in positioning themselves within this equilibrium.

Investing in knowledge networks implies providing and obtaining information; participation in knowledge networks implies a gentlemen's agreement on this. A higher degree of market orientation within agriculture implies more protection of innovative knowledge. Eventually, this will lead to the exhausting of the knowledge networks, because they will function as closed shops. The public knowledge infrastructure should help to avoid this market failure.

The application of new technologies is not easy to achieve from outside the companies. Adopting new technology requires interaction between R&D and the enterprises. More 'linear' communication channels, like journals, magazines, et cetera, are used to select information. However, this linear information transfer does not seem to be sufficient to change the behaviour of the farmer. When the entrepreneur is deliberating advantages and disadvantages, personal interaction is needed. We stressed the importance of entrepreneurs experiencing a problem, or, at least, having a need for knowledge before changing their behaviour. The question is whether these conditions can be achieved by knowledge transfer alone. Important incentives to change behaviour are economic return and the expectation of sanctions in the future.

The knowledge context around agricultural enterprises is changing dramatically: from the stable OVO triangle with its linear knowledge transfer principles, towards an unstable, interactive innovation arena, where competitive knowledge is developed in changing networks of collaborative enterprises. These networks are not only built on a sectoral dimension, but chain relations and regional contacts are becoming increasingly important. Competitive enterprises regard innovative knowledge as a competitive asset. Sharing this asset is restricted to hedged networks where partners give and take, based on a gentlemens' agreement. Keeping in mind, that for agriculture we are dealing with small and medium sized enterprises, most of these networks are established on local or regional level.

To be effective on regional level, regional players should be aware of the chain dimension and the local dimension of the knowledge context: agricultural organisations should not focus only on agricultural knowledge institutes. As regional players they should serve local firms and networks by opening ways to both sectoral and chain related knowledge sources and by scanning opportunities to make "neue Combinationen" with local firms from other economic clusters. Some farmers have scouted these lanes of opportunities e.g. by developing combinations of farming and psychic health care or farming and the leisure industry. Also new initiatives to expand farming towards near activities in the food chain can be seen as new combinations of economic activities. These kinds of innovative initiatives need local support in the sense of networking, opening of knowledge channels and training for skills shifts, which should be easily offered by technical and agricultural colleges.

The notion of interactive innovation and learning points to a basic dilemma in analysing informal learning. Interactive learning and innovation should be analysed from a perspective of uncertainty. The impulses for learning cannot be predicted or planned, as is the case in the linear approach. Learning skills for interactive innovation, as part of the entrepreneurial craft, should comprise the capability of selecting impulses and combining newly selected impulses with existing skills and routines. Innovative farmers are quite capable in this kind of selective processes but, at the other hand, they protect themselves against an excessively chaotic context by staying in strong, known networks. Paradoxically, they need new impulses from weak, unknown networks to be continuously innovative. Innovative learning is balancing between the chaos of uncertainty and the old grooves of experience. Knowing how to escape this paradox forms the core competence of innovative entrepreneurship.

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Learning and work experience:
European perspectives on policy, theory and practice

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Introduction

The research project on which this paper is based was developed in the context of the knowledge economy and the twin challenge of globalisation and regionalisation. It addresses the changing nature of work and the elusiveness of the true learning potential of work experience. The project has examined the processes of work experience in the light of: developments in learning theory, changes in the European labour market and national policies and trends in workplace requirements and organisation (Griffiths *et al* forthcoming). The project has been carried out under the EC Fourth Framework (Targeted Socio-Economic Research - TSER) under the title of *Work Experience as an Education and Training Strategy: New approaches for the 21st. century* and has prioritised the exploration of work experience as an informal (work-based) context of learning. It involved partners from the United Kingdom, Sweden, Ireland, Spain, Denmark and Hungary. The project will be completed early in 2001 and a European research conference will be held on 2-3 February in London to discuss its findings.

The policy context: summary

The project's policy studies have shown:

that progress in policy development appears framed as improvement in the quality of management arrangements, not learning process

that there is a failure to develop new frameworks – theoretical and conceptual – for relating learning in work-based contexts to formal education and training

that the multifunctionality of work experience falls short of capturing its learning potential, failing ultimately to be rooted in the knowledge that work is not solely a context which students learn *about* – but is also a context *through which* students can learn and develop.

that the difficulties experienced by policy makers in interpreting change and setting new developments in motion are confirmed and that they are exacerbated by the deep embedding of the academic/vocational divide, itself exacerbated by the 'digital division'.

that these findings are in contradistinction to the easy consensus across the EU about the 'value' of work experience, despite the dearth of good evaluation studies, particularly of learning, and the fact that, for all the fresh thinking about work experience, the mainstream curriculum has remained largely unaffected – certainly in the UK but elsewhere in Europe too.

that the type of thinking devoted to 'learning outcomes' needs to be challenged. A narrow focus on outcome *at the expense of* the process of learning and the relationship between different types of learning (formal and informal) is at best counter-productive.

that the pressure to make work experience more widely available to young people has addressed new issues about skill development by relying on old models of learning in the workplace. Granville (1999) refers to the phenomenom of 'innovation without change', the capacity of a system to accommodate the rhetoric of reform within the culture and practice of the *status quo*.

Learning through work experience

The brief summary given above of the 'policy context' (Griffiths, Guile and Attwell forthcoming) provides the background to the project's theoretical explorations of the following themes which have arisen recently as major topics of concern in socio-cultural learning theory. The themes are as follows: the question of 'context' – in the sense of the learning which occurs within and between different contexts of education and work; the question of 'mediation' – in particular, the process of mediation which can provide learners with the basis for connecting context-specific learning with ideas or practices originating outside those contexts; 'boundary crossing' - in the sense of re-examining and re-formulating questions about learning within and between the context of education and work; 'consequential transitions' - an individual, developmental process involving the full person, not just the acquisition of another skill; and the concept of 'connectivity'.

The concept of *context* (Beach 1999; Engeström forthcoming; Hutchins 1995) and *practice* (Lave 1993; Lave and Wenger 1991; Wenger 1998) have in recent years become crucial to the debates about how students learn and develop through all forms of work-based activity. Up to now, however, most models of work experience have either ignored the influence of context upon learning or have approached this issue mechanistically (Guile and Griffiths 2001). In order to analyse the relationship between the learning which occurs within and between the different contexts of education and work, we discuss briefly the debate in contemporary learning theory about the way in which context helps to 'shape' learning and development. We go on to outline the typology of work experience developed through the TSER project which includes a new model of work experience – the *connective model*. Finally, we highlight through case study evidence how the connective model provides the basis for a productive and useful relationship between formal and informal learning.

Work as a context for learning and development

The reappraisal of the work of John Dewey (1981, 1986 and 1988) charted by Cole (1995), the recent interest in the affinities between Dewey's and Vygotsky's (1978) ideas about the social basis of learning (Prawat 1999), along with the growing influence of the cultural-historical school of psychology (itself influenced by the work of Vygotsky), has been very influential and has involved a revisiting of the question of context in contemporary debates about learning (Beach 1999).

Dewey emphasised the importance of not separating events and circumstances from their contextual whole: 'in actual experience, there is never any such isolated object or event, an object or event is always a specific part, phase, or aspect, of an environment experienced world' (Dewey 1986). This understanding that context is not fixed, well-defined and stable but is shaped by the relationships between people, their activity and the social world of which they form part is complemented by Vygotsky's work and the work which it went on to influence. By placing the idea of *mediation* at the centre of the learning process, Vygotsky reconceptualised learning as a 'complex mediated act', a triad involving the subject (the individual), the object (the task or activity) and mediating artifacts (*eg*, communication and information technologies, books). Although they offer slightly different interpretations of Vygotsky, the ideas of *situated learning* (Lave and Wenger 1991), *distributed cogntion* (Hutchins 1997) and *activity theory* (Engestrom 1996b) have contributed to broadening the debate about the relationship between context, mediation and human development. These theories offer us different but complementary insights into the process of learning through work experience.

Lave and Wenger (1991) have demonstrated how, in fairly stable and well-bounded 'communities of practice', the process of 'legitimate peripheral participation' enables individuals to acquire knowledge and skill through contact with more experienced others, while Hutchins (1997) has demonstrated how the learning of new tasks is mediated by many different types of structures distributed throughout different cultural settings. Engeström has concentrated on analysing how learning occurs in work situations which are not necessarily stable and well-bounded (Engeström *et al* 1995, Engeström *et al* 1996). His basic unit of analysis is the idea of an 'activity system', in other words, the complex interrelations between individuals and different workplace 'communities' or 'networks' which are influenced by the division of labour and workplace rules and procedures. Engeström argues that workers are increasingly expected to act as 'boundary crossers' between 'activity systems', in other words, to possess the ability to contribute to the development of new forms of social practice and to produce new forms of knowledge. According to Engeström, this involves learning how to contribute to the transformation of work contexts, an issue rarely raised in the work experience literature.

Lave's and Wenger's, Hutchins' and Engeström's analyses of the interrelationship between context and practice raise interesting questions, including the question of how easily students gain access to and operate in such work contexts. A recurring assumption in the general education and VET work experience literature is that this happens *ipso facto*. However, this neglects the extent to which participating in a 'community of practice' can be highly problematic. As Ghererdi *et al* (1998) have observed, it requires 'host' organisations actively to provide opportunities for learners to observe, discuss and try out different practices with members of the 'community' they have temporarily joined.

As we demonstrate through our case study evidence, participating in workplace 'communities of practice' raises serious questions for the providers of work experience about, first, the extent to which the 'host' organisation enables students to participate in interacting with more knowledgeable others in the workplace 'zone of proximal development' – something which may well depend upon its Human Resource Development strategy (Guile forthcoming). Second, the need for education and training providers of work experience to recognise that students need to learn in ways different to those in which they learn at school or college (Beach and Vyas 1998) and that students do not easily accomplish these methods of learning, partly because these types of 'horizontal development' are not easily reconciled with conventional ideas about 'vertical development' and run counter to school experiences. This calls for careful mediation.

Consequently, Lave and Wenger, Hutchins and Engeström's ideas suggest that new questions should be asked about how students learn through work experience provided as part of their general education or VET. It is thus important to explore how work experience can provide (i) a context for participating in 'communities of practice' and learning how to develop the ability to act as a 'boundary crosser' and (ii) a means of re-examining and re-forming the relationship between work experience and formal programmes of study.

The relevance of these issues for work experience is gradually being recognised elsewhere in Europe. In a report of the LCVP research and evaluation project in Ireland, Granville (1999) has criticised the dominant interpretation of 'transfer' in the education systems as stressing 'the degree to which a behaviour will be repeated in a new situation'. In contrast to this restricted conception, he refers to the concept of *consequential transitions* (Beach 1999) which recognises an extra dynamic in the process, one which must involve the exploration of new territory for which pre-learned response and solutions are unavailable. Consequential transitions involve the construction of new knowledge, identities and skills through transformation (rather than the application or use) of something that has been acquired elsewhere. A transition of this form involves a notion of progress and is best understood as a developmental process. Such transitions may involve changes in identity as well as changes in knowledge and skill. In other words, they are processes that involve the full person and not just learned attributes or techniques.

Conceptualising approaches to work experience

A typology of work experience

Drawing on the theoretical explorations within the TSER project, we outline five different approaches to or *models* of work experience which embody changing responses to policy, to the learner, to skills needed and to pedagogy. This conceptual framework deploys a 'five-by-five matrix'. The horizontal axis identifies five different models of work experience:

1. *The traditional model of work experience: 'launching' students into the world of work.*
2. *The experiential model: work experience as 'co-development'.*
3. *The generic model: work experience as an opportunity for key skill assessment.*
4. *The work process model: a strategy to assist students in 'attuning' to the context of work.*
5. *The connective model: a form of reflexive learning.*

The vertical axis identifies five main features of the models:

1. The purpose of work experience (*ie*, the reason for providing the work experience).
2. The assumptions about learning and development (*ie*, the ideas about pedagogy and learning in workplaces).
3. The practice of work experience (*ie*, the extent to which practice is seen as divorced from context).

4. The role of the education and training provider (*ie*, the pedagogic strategies employed to support students in learning).
5. The outcome of the work experience (*ie*, the form of knowledge, skill or broader capabilities that students have developed).

The first four of the five models reflect the influence of different economic, technological and social factors prevailing within European countries as well as different ideas about learning and development. Although the models may be specific to different periods of economic and technological development and reflect changing educational ideas about the process of learning, as the final report from the TSER team indicates (Griffiths *et al* forthcoming), they do co-exist in different countries. They are analytical rather than descriptive; no specific work experience programme fits neatly into any of the models and some programmes may contain elements of more than one model. The fifth model presents a new approach to work experience which is based upon the principle of *connectivity* and takes account of the theoretical considerations discussed here. It displays innovatory features which are relevant to future approaches to effective learning through work experience and provides a basis for different explorations (Herlau, Krarup and Rasmussen 2000).

Typology diagram (attached) to be inserted here.

1. The traditional model of work experience: 'launching' students into the world of work

This model reflects the tendency in (i) apprenticeship-based work experience programmes to mould and adapt students' skills in workplaces (Vickers 1995, Stern and Wagner 1999a, 1999b); and (ii) school-based work experience schemes, which were introduced in the UK in the 1970s, to assume that students unconsciously or automatically assimilate relevant workplace knowledge, skills and attitudes and internalise the implications of occupational changes occurring in the workplace (Watts 1983). This emphasis upon both adaptation and assimilation in the traditional model of work experience is a distinctive feature of a technical-rational perspective on education and training. Students engaged in work experience have often been viewed as 'containers' (Lave 1993) into which various forms of social interaction can be 'poured' and it has been assumed that knowledge and skills can be taught quite separately from the context of their use.

These assumptions about learning are consistent with what Kindermann and Skinner (1992) have termed a 'launch' perspective on the relationship between people and their environment. In other words, it is the initial learning situation (school, college or vocational training centre) which largely determines what a person will do in a new situation: the earlier learning determines the trajectory of later learning, with the environmental influence being fairly minimal. Thus, from this perspective, the prime purpose of traditional models of work experience has been to 'launch' students into the world of work

Conceptualising work experience simply as 'launch', however, leaves little incentive to develop a theory of how students learn and develop through work experience (McNamarra 1991, Granville 1999) and this has helped to maintain the divisions between formal and informal learning and academic and vocational education (Lasonen and Young 1998).

2. The experiential model: work experience as 'co-development'

This model reflects the view expressed in many American and European approaches that all stages and phases of education should be made 'relevant' to students and that there should be a more problem-based approach to education and greater use of inquiry-based models of teaching and learning (Prawat 1993).

In the case of work experience programmes, it has resulted in the development of models of work experience which were based on a version of experiential learning. Specifically, Kolb's idea of the experiential 'learning cycle' has been perceived in general education as providing a useful framework for understanding how students learn through work experience (Jamieson *et al* 1988, Miller *et al* 1991). One consequence of adopting this slightly broader perspective on work experience was that it placed the idea of a student's interpersonal and social development at the forefront of the agenda for work experience (Miller *et al* 1991, Stern and Wagner 1999; Wellington 1993).

These attempts to take more explicit account of the *actual* trajectory of a student's development resulted in greater dialogue and cooperation between education and workplaces. In many ways, they reflect Kindermann's and Skinner's notion of 'co-development' between interested parties (1992). This led to greater interest being displayed in ensuring that work experience took greater account of two issues in particular. The first issue was the need for educational institutions or intermediary agencies, such as education-business partnerships, to negotiate clear objectives for students, workplaces and schools/colleges in advance of the work experience (Griffiths *et al* 1992, Miller *et al* 1991). The second issue was the development of new pedagogic practices to assist students in identifying, possibly through the use of a de-briefing process after the work experience, the influence of the experience on personal and social development (Watts 1991).

Despite these pioneering developments, the *mainstream curriculum* in most EU countries was left broadly unaffected, with work experience effectively kept separate from it. Equally, the whole question of the relationship between theoretical study and work experience, even in countries with strong apprenticeship systems, was also left unresolved (Griffiths and Guile 1999).

3. The generic model: work experience as an opportunity for key skill assessment

One of the main educational debates in Europe in the late 1980s and early 1990s concerned the attempt to promote a greater sense of learner autonomy and self-discipline, particularly in low-attaining students, within general and vocational education programmes (Green *et al* 1999). These developments have led, in the UK in particular and, to a lesser extent, in other parts of Europe, to the emergence of what may be referred to as a 'generic' perspective on learning. By and large, this perspective is based on the idea that it is, first, more liberalising and egalitarian to adopt a system which attaches prime importance to the 'outcome', the result, and does not prescribe the form of learning necessary to gain a qualification (Jessup 1990). Second, it reflects the idea that an agreed series of common outcomes can be identified for any programme of study and on that basis it is possible to assess the learning that has occurred (Kamarainen and Streumer 1998). Despite being subject to considerable criticism about their behaviouristic (Ecclestone 1998) and mechanistic (Jones and Moore 1995) assumptions about learning, 'learning outcomes' have gradually become a feature of many work experience programmes.

In the case of work experience, the emphasis on student-centredness and learner-autonomy has been interpreted as planning a work experience placement and managing and evaluating the learning through the use of statements about 'learning outcomes' which are a part of a personal action plan (Miller 1996, Oates and Fettes 1997). The plan serves as a type of contract between the individual, the workplace and the educational institution, thus facilitating student self-assessment and external verification of key skill development within a workplace.

The idea of teacher/trainer-facilitated reflection, however, is problematic (Usher *et al* 1997). It rests on the assumptions (i) that 'experiential learning' is a natural category and (ii) that the 'voice' of an individual or community constitutes in some way authentic knowledge of a situation. As Moore and Muller (1999) argue, the idea of 'experiential learning' and 'voice discourses' are themselves endowed with theoretical assumptions. Accordingly, the meaning and significance of experience depends not only upon the experience as such but also on how and by whom it is interpreted (Brah and Hoy 1989).

By playing down the need for those in education or workplaces with responsibility for supporting the process of learning to explore with learners the extent to which experience is influenced by the constraints of its context, the generic model of learning has failed to accommodate the fact that leaners have to be immersed in *ideas* as well as in the world of *experience*. For example, using a scientific concept in a practical situation involves resituating it in a firm which fits the context (Guile and Young forthcoming). This is not a process of logical reasoning but rather of 'mulling over' the situation until 'something seems to fit' (Eraut 1999). It relies on the *process of mediation* being carefully managed to ensure that learners develop the basis for connecting their context-specific learning with ideas or practices which may have originated outside those contexts.

4. The work process model

One response to the classic problem of division between formal and informal learning that the other models have failed to address satisfactorily has emerged from within the German VET tradition. The concept of 'work process knowledge' - understanding the labour process in terms of product-related, labour organisational, social ecological and systems-related dimensions - has been introduced to assist apprentices and teachers in overcoming the dilemma of 'inert knowledge', that is, knowledge which has been taught but has not proved useful in practice (Kruse 1996).

The main distinguishing feature of the concept of 'work process knowledge' is that it draws attention to the combination of theoretical and practical learning which prepares apprentices to engage more rapidly with new organisational forms of production and enables them to move into alternative work environments more easily (Fischer and Stuber 1998).

The prime purpose of work experience, from this perspective, is to help students *attune* themselves more successfully to the changing context of work through the opportunity to participate in different communities of practice. The idea of 'attunement' recognises that the development of any individual is affected by the task or activities which he or she is asked to undertake in a specific context and that the context, in turn, is also affected by their development (Kindermann and Skinner 1992).

It has been noted, however, that work experience will not by itself promote work process knowledge and that it needs to be *mediated* - perhaps by the introduction of concepts, perhaps by subject knowledge, and that the process of mediation may take place within the workplace and company-training centres (Attwell and Jennes 1996). Thus, Attwell and Jennes conclude, in relation to the German VET programmes, that these programmes will have to be further evolved to help students connect formal and informal learning more explicitly.

5. The connective model

This model of work experience is based upon the idea of a 'reflexive' theory of learning (Guile 2001) which involves taking greater account of the influence of the context and the organisation of work upon student learning and development, the situated nature of that learning and the scope for developing 'boundary crossing' skills. It also entails developing new curriculum frameworks which enable students to relate formal and informal, horizontal and vertical learning.

The term, *connectivity*, defines the purpose of the pedagogic approach which would be required in order to take explicit account of the vertical and horizontal development of learning. Supporting students to understand the significance of these two dimensions of development constitutes a pedagogic challenge, albeit a rewarding one, for teachers in educational institutions as well as those with responsibility for development in the workplace. It involves encouraging students to understand workplaces as a series of 'interconnected activity systems' (Engeström forthcoming) which consists of a range of 'communities of practice' (Lave and Wenger 1991, Wenger 1998) and 'distributed resources' (Hutchins 1997). In addition, it involves teachers and workplaces appreciating that work experience provides a range of very different ways of learning, compared with how students normally learn in school (Guile and Young forthcoming).

Consequently, learners, teachers and workplaces need to ensure that work experience, first, provides an opportunity for learners to 'learn to negotiate how they learn' in workplaces, since this is critical to effective workplace performance (Beach and Vyas 1998), as well as to learn the new capabilities that are gradually being required in 'high-performance' workplaces (Guile and Fonda 1999). Second, they need to support learners to appropriate concepts acquired through vertical development, and which are external to the context, and to mediate the relationship between their formal programmes of study and, for example, trends in labour and work organisation. Thus, learners not only have to develop the capacity to participate within workplace activities and cultures; they must also learn how to draw upon their formal learning and use it to interrogate workplace practices. Eraut (1999) suggests that this could involve: use of prior knowledge, seeing the relevance of concepts, resituating the concepts and integrating the new knowledge. These ideas about learning through work experience imply a reappraisal of human resource development strategies, as well as management and developmental practices, by 'host' organisations and of pedagogic practice by teachers, since students and workers have to learn how to enter unfamiliar territory and work collaboratively in different communities of practice.

One of the most significant implications of this re-conceptualisation of work experience is evident in relation to the question of the 'transfer of learning'. Instead of viewing transfer as a matter of reapplying the knowledge and skill acquired in one context (a workplace) into another context (another workplace), it becomes more helpful to view transfer as a process of 'boundary crossing' (Beach 1999; Engeström and Terrtu-Grommi forthcoming). This reflects the recognition that students are likely to be engaged in a variety of different tasks and in different contexts and thus may come to demonstrate what Reder (1993) has referred to as 'polycontextual skills'. Such an approach takes account of the fact that learning is a process both of self-organisation and enculturation (Cobb 1999) and that these processes occur while individuals participate in cultural practices, frequently while interacting with more knowledgeable others in the workplace 'zone of proximal development'.

At one level, learning through work experience calls for the formation of new mediating concepts' which assist learners in developing the forms of social interaction that support dialogic problem solving (Guile and Griffiths forthcoming). At another level, it involves learners in functioning as 'connective specialists' (Young 1998), using specialist knowledge and skill acquired in formal education to understand why certain types of performance are required in different work contexts and how to work with others to produce new knowledge. Thus, teaching and learning become more a product and process of interaction within and between contexts and the successful mediation of these relationships is based upon a recognition that learning involves the *negotiation of learning* as part of actual workplace experience.

Innovative practice in work experience

The idea of work experience as a form of practice

As the typology indicates, the concept of *practice* is central to understanding the learning and development that occurs through work experience. The idea of practice provides a way of analysing human cognition and development as an integral part of a larger system. It has a long and distinguished history in the social sciences (Bourdieu 1977, Wenger 1998) and is inextricably bound up with the idea of learning. Certainly, many accounts of practice emanating from cognitive psychology have stressed that one of its central features is the cognitive ability to acquire facts, knowledge, problem-solving strategies or metacognitive skills, while sociological accounts have tended to stress immersion in *habitas*, that is, cultural codes and conventions (Bourdieu 1977).

Recent work in socio-cultural learning theory, in particular, Activity Theory (Engeström forthcoming) and Situated Learning (Lave 1993, Lave and Wenger 1991, Hutchins 1995, Wenger 1998) has suggested, however, that it more helpful to view practice in relational terms. To begin with, this avoids treating the concept of practice and the context in which the practice is situated separately and allows both the macro-structural and personal process of construction to be taken into account (Lave 1993). Moreover, the development of practice is not simply a matter of solving problems through the application of cognitive skill; rather, it involves learning how to use the 'resources', which may reside in or be distributed across different contexts to develop understanding, identity, new knowledge and, ultimately, to transform practice (Hutchins 1997).

By specifically eschewing the assumption that students engaged in different forms of work-based practice can be viewed as 'containers' to be filled-up with relevant knowledge and skill (Lave 1993), it is possible to avoid assuming that the social practice in which students become involved *automatically* enables them either to assimilate relevant workplace knowledge, skills and attitudes or to internalise the implications of occupational changes occurring in the workplace, adapt to the 'world of work' and develop an occupational identity (Guile and Griffiths forthcoming). Further, a cautionary note is needed: namely, that mastery of a practice may not be possible solely through participating in that practice (Lemke 1997). It may be that full 'membership' entails participating in another 'community of practice' in order to be counted as having mastered the practices of the first community.

In the light of the above considerations and working from the insights of Engeström, Lave and Hutchins about practice, it is important to distinguish between the *forms* of practice, the *meaning* of practice and the *historically constructed* basis of practice. *Forms* of practice relate to the different types of vocational/professional practice (*ie*, 'communities of practice') in which students might participate, pedagogic practices which support learning through work experience and the forms of practice associated with different activity systems, which in turn help to shape the division of labour and rules which students encounter in workplaces. The *meaning of practice* reflects the idea that any form of practice has to be meaningful: (i) in terms of the activity system in which the practice is situated and (ii) for the individuals who are engaged in the practice. In the case of the *historically constructed* basis of practice, it is important to remain sensitive to the fact that all forms of practice are historically constructed activities which are constantly evolving and changing.

These distinctions alert us to the important relationship that exists between the context of education and the context of work. The Lave argument about learning stresses that mastery of practice is acquired by participating in specific forms of practice. However, as Lemke (1997) has observed, sometimes even full participation in practice is insufficient by itself to achieve full membership and understanding of that practice. For example, participation in the activities, rituals, *etc.* does not necessarily by itself reveal the esoteric meaning of practice. Sometimes, people have to be 'schooled' in the mysteries of practice, use formal education to explore the changing historical significance of practice in order both to be accepted as a member of a 'community of practice' and to develop the confidence to perform as a member of that community.

Because practices involve learning how to perform in different contexts, it is also important to bear in mind the earlier distinction between different interpretations of the concept of context in relation to work experience. One interpretation defined context as a pre-given object or condition or set of objects or conditions (with three different aspects: the organisational context, the production context and the changes occurring within context). The other interpretation reflected the idea that work and education are contexts *through which* students can learn and develop (Guile and Griffiths forthcoming). This distinction can be used help students appreciate that the meaningful actions in which people engage have what Lemke refers to as, 'meanings of relations to one another in terms of a cultural system'. In other words, membership of a community of practice involves not only learning how to perform in one context but also what the performance means and how it might relate to other aspects of social or cultural life. We explore the significance of these issues in the Case Study below.

The Connective Model of Work Experience

The Connective Model of Work Experience is an attempt to formulate a model of work experience which does not restrict the focus of learning to the individual, seeking simply to identify development by describing the individual's response to external stimuli. The Connective Model conceives the relation between people and the environment in terms of the complex processes of entrainment, coordination and resonance which characterise the interplay between practical activities in cultural contexts. The following Case Study helps to illustrate the principles of the Connective Model of Work Experience by exploring the practice of work experience in relation to the context where it takes place. In drafting the Case Study, we have endeavoured to identify the following four assumptions of 'connectivity'. They are, first, that learning entails engaging in some from of *activity* that takes place in historically constructed social situations (Engeström forthcoming). The second is that the process of learning takes place in a mediated activity which occurs in a *zone of proximal development* (Vygotsky 1978). The third is the *situated* basis of learning (Lave and Wenger 1991). The fourth is that cognition is *distributed* across contexts (Hutchins 1997).

Case Study
East Berkshire Further Education (FE) College and Legoland (Windsor)

Background

In common with many other colleges of further education in England wanting to enhance the GNVQ framework though the provision of work experience, the Media Faculty at East Berkshire College attempted to use work experience to overcome the perceived limitations of the GNVQ framework (Helsby *et al* 1999, Hyland 1994; Hodkinson and Mattison 1995).

The Faculty is committed to providing students with a holistic curriculum which includes work experience. As a consequence, business partners have been identified who are prepared to work collaboratively with them and 'host' planned programmes of work experience. One of these partnerships is with Legoland.

The main aims of the partnership are to:

provide GNVQ Media students with the opportunity to develop their skills as journalists, as well as their practical media-based skills;

provide an insight into the ever-increasing application of media-based knowledge and skill within modern workplaces;

develop the capabilities of students to work in different organisational contexts (*ie*, as 'boundary-crossers') and thus support their future employability.

The practice of work experience

The work experience involves students producing Legoland's Staff Newsletter. This newsletter is produced on a monthly basis and is distributed to all the full and part-time staff who work for Legoland. The work experience programme recurs throughout the year and this allows different cohorts of GNVQ Media students to produce each newsletter.

Producing the Newsletter not only involves students in researching and writing all the copy; they also have to learn how to work within Legoland's corporate guidelines in order to design the final layout. Working on the Legoland site involves students developing their skills as 'investigative' journalists through talking to staff at all levels and identifying possible 'human-interest' 'storylines' for the forthcoming newsletter.

Producing the newsletter means that students need to have access to the College's own internal Information and Communication Technology resources and involves liaising with staff in the Media Centre and at Legoland. Such contacts are invaluable in assisting students continually to improve their practical media-based skills and so enhance the design and layout of the newsletter so that it conforms to the publications criteria pre-set by the company.

Mediating transitions

The rotation arrangements which underpin the production of the newsletter enable a significant percentage of the GNVQ Media cohort to experience some form of 'consequential transition' (Beach 1999) by continually crossing the boundary between school and college and taking responsibility for varying their performance between two work contexts which are constantly evolving.

Developing this level of maturity can sometimes be quite painful. Some students report that it is much more daunting when Legoland's staff point out the limitations of their work (*eg*, in relation to the content and layout of the newsletter) than it is when College staff make similar observations. Although the zone of proximal development that characterises the student-teacher relationship can be fraught with tensions, it still provides a space for students to 'fail' since it is accepted that their identity and expertise are constantly changing and developing. In contrast, once students enter Legoland, they are subject to the same type of demands that the company would place upon full-time staff and thus perceive that they are no longer in the comfort zone of 'failing honourably'.

Mediating learning

The process of mediation is supported through teachers encouraging students to apply the theoretical concepts and the technical skills that they have acquired through the formal component of their GNVQ programme in order to produce the newsletter. For example, each cohort of students is encouraged in tutorials to draw on their understanding of the idea of 'target audience', 'register and tone' and 'sequencing' of 'storylines' in order to draft copy that approximates to copy produced by a professional journalist.

One of the main ways in which students develop a more 'connective' perspective on the relationship between their formal and informal learning is by treating the production of the newsletter as though it were a 'core occupational problem' (Onstenk forthcoming). In other words, this would be the type of problem which might provide ideas as to how to tackle similar problems in future. Staff feel that this provides a spur for students to look beyond current practice and helps them shape how such problems could indeed be tackled in future.

Having opportunities to apply their conceptual knowledge to explain changes in journalistic practice is crucial and assists students in understanding the meaning of, for example, the practice of a journalist and in developing new knowledge about how the media industry or journalistic practice may change in the future. This provides students with a much stronger conceptual framework for developing the written assignments to be presented as part of their GNVQ Portfolios.

Working at Legoland has placed students in a position where they have to learn how to accept responsibility for their own actions as well as for the decisions they make when contributing to the production of the newsletter. Thus, in order to gain maximum benefit from the work experience, students have to demonstrate that they can respond positively to feedback about the need to redraft their own text or to amend their layouts in order to improve the quality of the newsletter. In this sense, they are modelling aspects of the practices associated with the role of 'student' and 'trainee journalist'.

Students do not achieve this level of self-development and personal autonomy simply through their own capacity for autonomous self-directed learning or 'learning-by-doing'. Staff at Legoland and the College have to collaborate in order to provide a supportive context, while students have to learn how to use effectively the learning resources (*ie,* mediating artefacts) which are distributed across two sites and which help to structure their learning. The learning and development which therefore occurs as a result of students moving from one context to another (*ie,* 'horizontal development') arises from the complex interplay between the students' performance and the 'environment for learning' created by the Media Faculty and Legoland.

Creating environments for learning

One important element of this 'environment' is ensuring the students have access to a 'learning curriculum' (Lave and Wenger 1991). This concept emphasises that access to certain resources (such as people, networks technology) are an invaluable part of assisting students to become effective members of a 'community of practice', capable of developing greater degrees of independence. By providing students with access to the work site and the professional expertise of their Press Relations personnel, Legoland has recognised that 'hosting' a work experience involves staff actively in providing opportunities for students to observe best practice and to discuss and try out new practices with those members of the 'community of practice' which they have temporarily joined.

Unless students have access to a 'learning curriculum', it is very difficult for them to develop the capability to use the College and Legoland as dual 'sites' (*ie,* contexts) for learning. The opportunities to research, write and design an authentic media product in an environment not only provides them with a very effective simulation of the conditions they are likely to encounter once they leave College and take up full-time employment, either in the media industry or elsewhere; it also enables them to talk to and socialise with a diverse range of Legoland employees and thus enrich their grasp of the changing and uncertain nature of the practice of media work. In this sense, the actual experience of producing an authentic media 'product' helps students to develop 'work-process' knowledge,

Conclusion: the implications of designing and delivering the Connective Model

Supporting students to adopt a more 'reflexive' and 'connective' stance towards the relationship between their work experience and their formal study sets different challenges for educational institutions, companies and students themselves.

Educational institutions have to persuade companies to provide students with opportunities to participate in different 'communities of practice'. In the case of East Berkshire College's partnership with Legoland, the Media Faculty had to ensure that students would be able to work alongside members of Legoland's Publicity and Corporate Relations department, Site Management *etc.* so that they could acquire the information and develop the expertise necessary to produce the Newsletter.

As a consequence, Legoland, as the 'host' organisation, had to ensure that staff who were supporting students' 'boundary crossing' activities were: setting students stretching, but not unachievable, tasks; encouraging them to ask questions about work practices; and giving constructive feedback about their performance. This, in turn, involved Legoland's own line managers in accepting responsibility for creating an environment which brought forth added value from all students as well as their own staff.

Educational institutions also have to be prepared to interrogate their own work practices. For example, having encouraged students to view all workplaces as a series of 'interconnected activity systems' consisting of a range of 'communities of practice', the Media Faculty recognised that it also had to respond positively to feedback from students about perceived deficiencies in the design and delivery of the College components of the work experience. This, ultimately, led them to re-think the relationship between learning processes which had been designed to support 'sequential' learning (*ie,* aspects of practice) and those designed to support 'conceptual' learning (*ie,* focusing on the relationship between practice and context). For example, the Media Faculty:

modified the delivery of certain GNVQ units to ensure that key parts of the programme were introduced before the students undertook work experience;

broadened the focus of tutorials *to consolidate the link* between different types of learning and ensure that core skill development was monitored and evidence of attainment recorded in students' Records of Achievement.

Supporting students to develop a more 'connective' approach to their formal and informal learning led College staff and line managers to recognise that they shared some pedagogic aims. They recognised that they had different, but complementary approaches in supporting students to:

recontextualise the activities they undertook in College and on site at Legoland and see them as a part of a whole;

use their developing intellectual capabilities to criticise existing knowledge and practice and begin to conceive alternatives;

apply what they knew and be confident about performing in new situations;

connect knowledge and performance to the knowledge of other specialists in educational institutions and workplaces.

Achieving these pedagogic aims, however, involved students taking the initiative and being prepared to 'learn-on-the-fly' (Beach and Vyas 1999) in Legoland and in the College. Initially, this involved developing the confidence to make requests for help from people whom they did not know. Subsequently, students began to ask themselves the following types of questions:

How do I use the knowledge and skill I feel that I have gained to support my 'practice' as a journalist/as a producer of a newsletter/as a vocational student?

What have I discovered about myself as a learner as a result of undertaking simultaneously a wide range of tasks?

Asking such questions led the students to recognise that learning entailed some form of self-organisation and enculturation and, moreover, that these processes occured more readily if they were able to:

participate in different but related cultural practices, for example, journalism and the theory of journalism;

(Encouraging students to conceptualise their experiences in different ways and for this conceptualisation to serve different curriculum purposes, sets a new pedagogic challenge for teachers. In many ways, it is very similiar in intention to what Freire (Freire and Macedo 1999) has referred to as the task of creating new 'pedagogical spaces', in other words, the use which teachers (in education or workplaces) make of their expertise to pose problems in order to help learners analyse their own experiences and arrive at a critical understanding of their reality.)

develop new ways of mediating their understanding of the forms of social interaction that supported dialogic problem solving.

The changing context of work and the future of work experience

Current context and future practice

The context of work has undergone fundamental changes over the last 20 years. One of the challenges facing companies throughout Europe is the question of diversity and dialogue within and between the contexts of education and work. This challenge has partly arisen as a result of the process of globalisation and partly through the introduction of lifelong learning policies in an attempt to prepare and update people for a continuously changing world of work (Guile forthcoming). At one level, globalisation has meant greater mobility in the labour market and hence greater inter-cultural diversity in the workplace. At another level, it has had an uneven impact upon European companies. Some are striving to become high-performance companies and hence are actively engaged in transforming product and service delivery through developing 'knowledge-intensive' forms of work. Other companies are content to continue offering 'low added value' products and services.

The cumulative effect of these developments suggests that new conceptual 'tools' should be developed to assist learners who are undertaking programmes of work experience so that they may both understand the evolving forms of work practice, and the types of dialogue encountered in workplaces and education, and develop perspectives on the diverse activities in which they are engaged.

By focusing on the relationship between the *practice* of work experience and *context* of work, the Connective Model of Work Experience has allowed new questions to be asked about how students learn, when participating in a work experience programme:

to understand and use the potential of subjects as conceptual tools for linking their workplace experience to their programmes of study and thus seeing it as part of a whole;

to develop an intellectual basis for criticising existing work practices and take responsibility for working with others to conceive alternatives;

to develop the capability to resituate existing knowledge and skill in new contexts as well as being able to contribute to the development of new knowledge, new social practices and new intellectual debates;

to become confident about crossing organisational boundaries or the boundaries between different, and often distributed, 'communities of practice'; and to connect their knowledge to the knowledge of other specialists, whether in educational institutions, workplaces or the wider community.

Although important insights have been generated about how to address these questions, the questions themselves have not yet been fully answered. This suggests that further work will have to be undertaken if the 'connective' model of work experience is to be developed in such a way as to realise its ambitions.

Recent work from Engeström and Hutchins has offered two promising clues about how to develop the Connective Model. In a paper discussing the 'third generation' of activity theory, Engeström suggests that the next step is to develop a theoretical framework that allows different activity systems to communicate more effectively with one another through the creation of a 'new shared object'. By this, he means constantly maintaining a horizon of possiblilities in order both to scrutinise and incorporate new ideas or forms of practice which may originate outside the immediate context as well as to generate new practice from within a specific context. Such activity is, he suggests, most productive when conducted within the area of the 'shared object'.

Hutchins, however, has drawn attention to the significance of the process of 'metamediation'. He employs this term to illustrate that 'learning curricula' or 'mediating artefacts' do not just stand between people and the context in which they are working. They are one of many elements that can be called upon in the performance of a task or to support understanding about a subject. This leads Hutchins to stress that mediation is not a process that automatically occurs in a single direction, in other words, from a teacher to a student or from a computer to a student. He argues that certain mediating artefacts help to organise the use of other mediating artefacts and it is this process of metamediation that makes for a powerful learning experience. For example, in the case of the GNVQ Media students, access to the Legoland site mediated, amongst other things, their understanding of the practice of media work and the relevance of formal study.

There are, many senses in which the ideas of 'new shared objects' and 'metamediation' may be relevant in developing the Connective Model of work experience. For example, they could encourage educational institutions and workplaces to:

identify what may be the 'shared object' arising from analysis of the different contexts of learning – as part of the process of effective mediation;

thus, explore how work experience may enable different activity systems to 'talk to each other' about common goals more effectively;

enable teachers and Human Resource Development personnel to develop a shared understanding about the relationship between formal and informal learning and the pedagogic strategies which support learners in relating these forms of learning to produce new knowledge (and hence equip them as 'boundary crossers');

support learners to use work experience to develop a *transformative* rather than an *informative* perspective about different types of social practice.

These and other questions will be addressed further in work to develop the Connective Model and in explorations with other research projects where the testing of the Model in new studies and situations may yield further insights.

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First Results form a comparative study on the professional reality of Vocational Teachers.

Organisation of Conditions for Professional Learning – Conditions for the Professional Organisation of Learning

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The project

There are two starting points for the research which was being conducted in the project of which I will present only a few and also preliminary findings here.

1. The first is a basic interest in comparative questions of Vocational Education and more specifically into the question of different profiles of VET teachers and instructors in

Vocational Education Systems and Institutions. In an applied view it is also connected to the question of international "standards" for teachers and VET teachers, issues which also have been investigated in the EU Commission funded projects EUROPROF and EUROFRAME (cf. Attwell, 1997) and by other international organisations, such as the UNESCO or the ILO. Regarding to the issue of teacher "standards" I would like to make some comments in the synthesis of this paper.

2. The second is constructed under the use of a rather "german lense": currently the German Dual System Vocational Schools are envisaged to become transformed into so-called regional centres of competence (Kurz, 2002). A process in which there develop new tasks for VET teachers. Besides the improvement of the traditional functions of VET schools there are manifold additional goals connected with this transformation:

- increasing institutional freedom and self-governance in terms of budgetary and personnel administration and decision-making
- increasing participation within the regional markets of lifelong learning.

Those objectives are accompanied by a Situation in which there is a "Crisis" of the traditional ways of University VET Teacher education as well as a teacher shortage, especially with regard to technical teachers (Buchmann & Kell, 2001; Gerds, Heidegger, & Rauner, 1999).

Consulting the existing knowledge base

Traditionally - apart from a few examples - comparative research designs in vocational education have focused on the comparison of different »systems« of vocational education, reform policies, cultural patterns etc. This is legitimately so, because the proper understanding of the overall system is quite important to interprete findings of comparative research correctly. Therefore, understanding »systems« in the cross-national context is a scientific task for itself (Lauterbach & Mitter, 1998). Those kind of research activities can be underpinned by rather idiographic or universalistic epistemological interests. However, they often to some extent fail to produce meaningful results for educational practice.

On the other hand there is the »best-practice« type of research which is often at risk to overinterpret findings by leaving out to put them into context (Sellin & Grollmann, 1999).

The research design taken up in this piece of research tried to overcome this boundaries, by taking up an approach which is taking up the results of international educational research and the existing knowledge base on teacher education and school development (Dalin, 1999;

Fullan, 1999; Terhart, 1996), while at the same time applying strategies of qualitative research such as ethnographic field visits and problem-centred expert interviews with teachers from different institutional contexts, leaving room and providing an empirical basis for a grounded-theory type of inductive reasoning (Glaser & Strauss, 1967). This was being done with the goal of developing small "grounded theories" of "professional cultures" or "realms"[1] within different types of VET institutions. It goes also in line with the idea of increasing the knowledge on padagogical case-knowledge as formulated by the American teacher researcher Lee Shulman (1986).

Vocational education – a domain different from education – the research design

Two issues reinforced the decision to choose an open strategy such as traced above. A lot of the existing research work which has been carried out is outdated or doesn't go to deep into the relations between different "parameters" of the different "professional realms" (e.g. Unesco, 1973; Unesco's section for technical and vocational education, 1997). The other one is that there is a considerable difference between the professional realm of teachers in technical and vocational education an those in general subjects and forms of school, especially when entering the international field. The teacher research literature, however is not paying special attention to technical and vocational teachers. The similarities between an electro-technology teacher and a construction teacher in terms of their knowledge base, formative experiences etc, are quite likely bigger than those of one of them compared to a mathematics, Greek or whichever academic subject teacher.

Therefore the existing knowledge from literature and research was being used in order to construct the basic research dimensions. Two terms which have been examined in the recent European as well as in the American Research Discussion on the teaching profession are "Professional Ethics" and "Professional Cultures" (Oser, 1998; Terhart, 1990, 1996). Those terms already indicate the cultural and societal and especially institutional embeddedness of professional issues (cf. also Gerds, 1995). Both terms from my opinion look at the "professional realm" coin from two different angles. This is being shown in the figure below:

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[1] The term professional realm is boroughed from the "Good-Work" research projects carried out by scholars in the US, investigating the personal and societal conditions of work which is being regarded by society as "good" as well as carried out by "excellent" professionals working in those occupations (Gardner, Csikszentmihaly, & Damon, 2001).

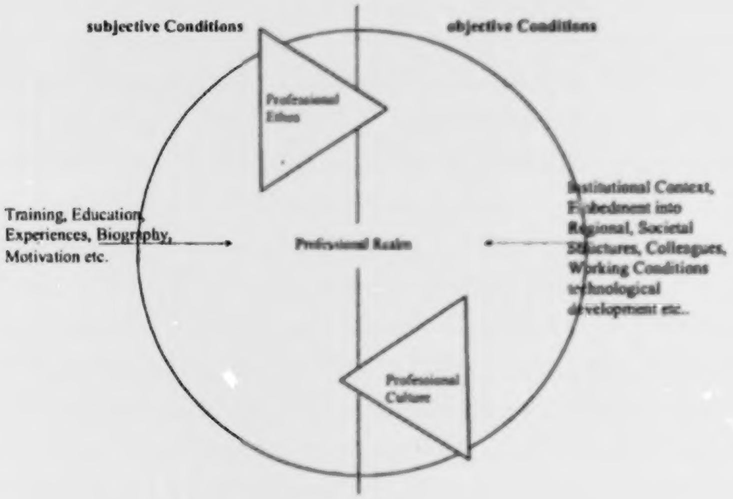
subjective Conditions
objective Conditions
Professional Ethos
Training, Education, Experiences, Biography, Motivation etc.
Professional Realm
Institutional Context, Embedment into Regional, Societal Structures, Colleagues, Working Conditions technological development etc..
Professional Culture

Figure 1: **The professional realm of VET teachers**

Different profiles from the first glance can be subordinated in the following figure, which just takes up the distinctions made in the upper figure and fills it with a dichotomous form:

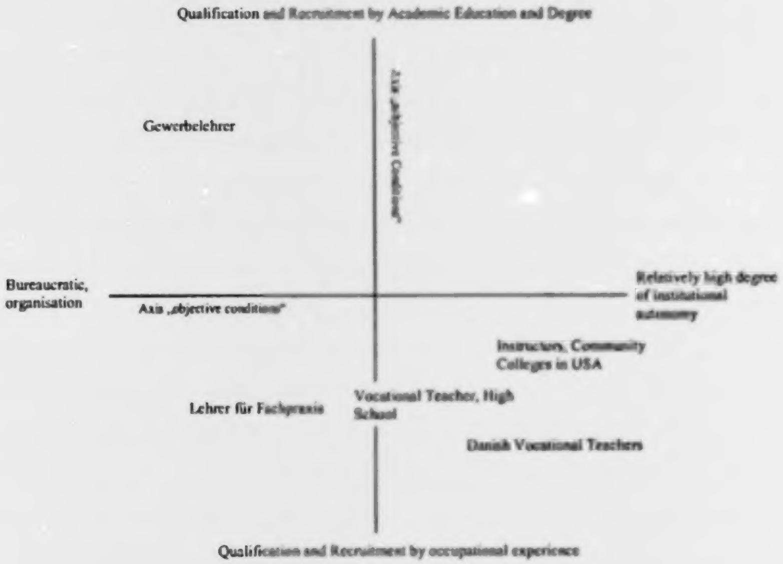
Qualification and Recruitment by Academic Education and Degree
Axis „subjective Conditions"
Gewerbelehrer
Bureaucratic, organisation
Axis „objective conditions"
Relatively high degree of institutional autonomy
Instructors, Community Colleges in USA
Lehrer für Fachpraxis
Vocational Teacher, High School
Danish Vocational Teachers
Qualification and Recruitment by occupational experience

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Figure 2: **Different "types" of VET teachers and instructors**

Figure 2 was being used to get a first order concerning different types of VET-teachers. The aim then was to further explore the actual relations between the different parameters of the professional realm of teachers.

The final sample consists of three American High Schools, two community colleges and three Danish Vocational Colleges and German Vocational Schools, where in all of which four to six interviews have been carried out. At least one Interview per Institution was directed towards a person which was in charge mainly of an administrative position. Altogether this 53 interviews were carried out.

The interview guideline focussed on different topics, mainly drawn from the literature on the teaching profession and school development, such as:

- biography and formative experiences,
- conceptions of a good teacher and a good school,
- barriers to high-quality professional agency
- institutional change,
- and practices and strategies of recruitment and promotion.

The interviewees were being asked explorative questions or in some cases confronted with general research findings. In the overall project the results of the interviewees are put into context with results from research on other levels such as the overall educational and societal system and the respective tradition of VET in the context were the field visits and interviews were being carried out.

Limitations to this paper – A sample of the sample

In the following section I will play around a little with some of the data I have gathered the way I have described above. The data processed and analysed through the following section stem from four selected institutional "anchor"-cases, altogether 21 interviewees, which I selected for in depth analysis at the beginning of data analysis. The criterion why I selected those cases, was that they represented "modal" cases of VET practice in their respective context because of size, and other contextual conditions. [2]

In advance to further analysis I applied a coding grid to the textually transcribed data material which consisted out of so-called thematic codes, which main purpose was to serve as an aid to orientation through the material. For this purpose each interview was processed and coded related to the original questions. Then, selected retrievals were possible for selected thematic issues such as the original questions as described above.

In this paper I will restrict myself to the thematic code "barriers" which was assigned to all chunks of text, in which the interviewees referred to obstacles they encounter in their professional everyday-life, either because asked explicitly or because turning to it in their answers. Basically, the then applied coding strategy was to break up the so retrieve data phenomenonwise, meaning each distinct phenomenon was coded separately. This resulted in 71 different codes, representing different phenomena. Those can be seen as the boxes with the green dots in the network representation[3] of the coding result in Figure 3.

In the next step the single phenomena were analysed and it was looked what different possibilities there exist to cluster. In this process one of the results was the possibility to cluster as can also be seen in the network view shown in Figure 3.[4]

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[2] In the overall sample it was unfortunately not possible to make up contrastive samples of "best-practice"-type institutions and such which rather could be described as problematic. Access to that kind of institutions obviously difficult to gain.

[3] This a way of presenting and exploring data which is possible in the computer assisted qualitative data analysis package Atlas Ti.

[4] In the course of the process of analysing the other thematic chunks there might evolve better possibilities of clustering, which are "richer" with regard to the "distinct professional realms".

Figure 3 The Universe of Barriers encountered by the interviewed Teachers

The cluster used here is made up inductively from the codes. Four different kind of phenomena can be distinguished:

1. barriers which are rooted outside the respective school/college
2. barriers which are related to teachers' attitudes and conceptions of the teachers role
3. barriers which are connected to characteristics of their students
4. barriers which are rooted in the respective internal organisation of the school.

Table 1 provides a quantitative illustration on the relative frequencies of different types of barrier phenomena as encountered by the interviewed teachers.

It shows that the majority of barriers mentioned by the vocational teachers and instructors in the community college are related to teachers' and instructors' attitudes and the internal organisation of the college. In the case of the high-school we find the majorities of problems mentioned in the group "students" and "outside". A significant share of the problems mentioned by the Danish teachers is relating to attitudes to teaching and conception of teachers and finally in the case of the German vocational schools most of the barriers encountered can be subordinated to the groups "outside" and "internal school organisation".

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Table 1: **A quantitative illustration of types of barriers encountered by interviewed teachers**

	Attitudes to teaching and conceptions of teachers	Students	Internal School organisation	Outside
Community College	**29%**	20%	**40%**	11%
High School	24%	**26%**	14%	**36%**
Danish Vocational College	**43%**	22%	22%	13%
German Vocational School	22%	10%	**37%**	**31%**

In the next section I would like to qualify this quantitative illustration, which mainly served the purpose to find the sore points, a little by presenting representative quotes of the interviewees, highlight important contextual conditions and give some interpretations.

Instructors from the Community College – Disciplines vs. Organisational Restructuring

In the community college which was selected here, some important organisational changes went on over the last 15 years. Those are to some extent similar to other institutions of this type.

The first change put in place was the transformation of the former "Technical Institute" into a "Community College", which resulted in the possibility to offer academic credits to the students and widened the scope of subject areas. This change went in line with the possibility to issue academic credits to the students and led to an increase in the total number of students.

The second development was the establishment of a "Business and Industry Department", which main task is to explore markets connected to the workforce development needs connected to the regional enterprises and industry.

Those two developments connect to the both groups in which most of the barriers encountered can be located.

> The facilities and space was another challenge. Laboratories to support your programs as your population started to increase dramatically in community college. All of sudden you don't have enough space for your campus, no capacities for your students. So you have to start to look at new ways to do that. So we again began to share our resources, so those electronic labs, drafting labs, computer labs, solely dedicated technology. We shared humanities departments or civilization courses or music courses, just because we needed the space. So that's the way of working together. That's what I was telling about team environment, because if team environment didn't exist, working-together didn't exist, that would not be possible.

This is indicating another challenge: apparently the development made it necessary to work closer together, a process which by the traditional organisation of the college was not that usual.

> Many of the partnerships I put together outside in industries are collaborations between two or three different groups. It is very difficult sometimes for people, because they stem form different areas.

Some of the educators even declare it as their goal to overcome those boundaries in their educational activities:

> I have personally been aware for years that there are often times a rift between the architects and the engineers or the architects and the contractors, and if something goes wrong on a project, "He did it. He did it," that sort of thing. I have always had the goal that I would like to see -- and I think that because we are a multi-disciplined department, we have architecture students sitting next to construction students, and I think they begin to understand one another's roles by being in the same classrooms. And that's not true in some of the baccalaureate degree programs; you don't have architects and civil engineers taking the same classes, and I think that has been an important thing that happens here.

What can be drawn from this example is that in processes of organisational restructuring it might be important to look at the "roots" of different teachers as far as their vocational subject area-background is concerned.

Teachers from the vocational high-school – Students as an obstacle for educational practice?

In the case of the high-school in this sample the groups "students" and "outside" make the biggest parts. US american high school students in the vocational track usually belong to those of the student population - except of those in a few special programmes - which are not the highest achievers in the academic subject areas. They represent about one third of their age group. For the vocational teachers this results in conceiving "nurturing of students" as one of their main tasks:

> And our teachers- you know students come to us you know not well of academically maybe. Either they failed some classes or they have got these and these, once again it is these teachers that nurture this kids. To say: "you can be successful. Here is how to use the math you now if they are in the machine trade, her is how to use trigonometry. Kids are scared to death of trigonometry but there will need their trigonometry to set up things on the mill in real life. And they never took Algebra 1 in their life. But because of that nurturing and that different way of approach to teaching, that coaching that mentoring, we brought a lot of kids along and got a lot of kids through the system in the job and being very successful.

or as another teacher puts it:

> But our kids, the kids that come here traditionally are the ones who did not do well in the old high-school mode of 'Come into class open your book, teacher goes to the board here is the problem, here is an example, do one to ten, if you got any questions ask me, Homework is that and the test is Friday.' They wouldn't do well with that. They could have been smart as a whip, but they just did not do well with that.

Even though defining their task in the way just illustrated, most of the teachers, when asked for the typical obstacles they encounter, mention these characteristics of their students and sometimes also connect that to the bad image Vocational Education has in the school system and in the society:

> Well I put these kids up to work, but there is this group of kids who just came her for credits and they really don't want to work in the field. They see it as an alternative school. That's probably where we get their negative opinion of Vocational Schools because we are kind of *dumping-ground*. Not a lot but I think to a point high-school counsellors would just say you need to go there, find a programme that you think you will like.

Currently there is a huge curricular reform going on, which predominant aim is to raise the academic standards of the overall student population, including also the weaker student groups. In terms of the organisation of instruction this led to the fact that teachers had to withdraw from a model which was called "applied academics" in which the academic teachers worked quite closely together with the vocational teachers, relating academic instruction to the respective occupational application. A new mode which officially is being called "Integrated Academics" has been introduced and because of the higher standards more time has to be invested now in to academic subject matter instruction, which organisationally led the fact that the academic classes are now mixed up with students from different vocational clusters, which makes it difficult to establish this connection. This trend is being described by the following quotation which is the continuation the "nurturing" one from above:

> [...] If they would not have that, they would have fumbled along and they might have graduated at night-school but they wouldn't have learned much and their grades would have been awful. OK. So that big change went because of the accountability, O.K. we have to do more math and science. So it has changed. What changes is how well we can nurture our kids. And the kids that come

> here. We don't do as good the job with that as we used to. Because we don't have that structure any longer. On the other hand probably our math, science and English scores are going up, which is what we are being held accountable for.

This quotation represents how most of the teachers define their role and also indicates that they have developed special modes of teaching they consider best for their students. This currently gets more and more under pressure because there is not much time available anymore for vocational instruction. That quote also indicates the problems that come up, when the "quality" of education is being judged only by one criterion – in this case and more and more so over all educational systems – by the level of academic achievement.

The Danish college teachers – The teacher as educational reformer

In the Danish case we have a big share of the nominations in the group "Attitudes to teaching and conceptions of teachers".

At the moment in Denmark there can be watched a fundamental reform process, which has its origins already in the early nineties. After a couple of reforms which introduced greater institutional autonomy, budgets etc. the educational "crowning" is the so-called Reform 2000, which main objective is basically to come to a individualised curricular structure, getting rid of the concept of "classes" and totally adjusted to the individual learners' needs. This changes the tasks and roles of the vocational teachers fundamentally.

> When I started two years ago, almost the whole division worked as a traditional school, where you get all the students in classes. One class, one teacher, and then the class is that time in the workshops and that time in the theory lesson and so on. Then we started to bring all the teachers into teams, so instead of one teacher-one task you got a whole area, where you got a team responsible for the education. And some of the teams are working very well, some do not. Sometimes it is very difficult for an old teacher who has taught the same way for twenty years, to apply new methods. But some of the teams are working very, very well. [...]
>
> The most difficult part is to convince the teachers that that is possible. That is the most difficult part. No, that is not possible, I need to have twenty people the same as in the classroom, and I had to bring them all the knowledge. We have turned it totally around and said: o.k the teachers are here and counselling the students and the students are responsible for their own teaching. And it works.

To face the possible problem of a total „atomisation" of students, the new concept of a contact teacher was introduced. The contact teacher serves as a mediator between the students and the teachers and consults the students in making up their own educational plans.

> Every monday morning they have a meeting. A contact teacher might have ten students. The first two hours at monday morning they sit together and they decide what they are going to do during the week. The students are making their own schedule. At the workshops they can sign up for different courses offered, two hours courses or similar. So the teacher knows who is going to show up. The students are making up their own schedules together with the contact teachers. After the first two hours the contact teacher knows what his students are going through the week. And the teachers in the workshop know also what assignments the students are working on. If a company calls me as a division chair, we got three people we would like to educate in some way, one year ago I was not able to do that, because I needed 18 students to make a class, now if I go with three people there, I can do it with the open space, I got the money and the teachers.

An interesting explanation for the fact, that most of the nomination concerning everyday obstacles are in the "teacher" group, is that there must be a widely shared belief that teachers are responsible for their own occupational situation themselves, which might be connected to the fact that during all the reforms of the last years, there was a strong involvement of the bottom "grass roots" level of teachers and principals and that there is a permanent communication between the Danish Institute for the Education of Teachers and the teachers themselves.

The German Vocational School teachers – Stakeholders vs. holders of vocational education expertise

In the case of the German high school almost 70 % of the articulated problems are distributed in the groups "outside" and "internal school organisation". This can be explained by the fact that the German schools are highly regulated in terms of teacher recruitment, organisational issues, promotion etc. A lot of management decisions have to be co-ordinated with respective school authorities. For the non-German speaking reader, I will paraphrase the following quote shortly: basically, it describes the procedure of employing some one on the position of the vice-principal, an affair which took five years altogether:

> Ja, ja, vor fünf Jahren, im Juni vor fünf Jahren, ging der damalige Schulleiter in Pension, vorzeitig, aus Gesundheitsgründen, und dann war ich selber erst Kandidat gewesen und dann war das Problem gewesen, dass damals sich keine Frau beworben hatte, also musste die Stelle ein zweites Mal ausgeschrieben werden, also, das dauerte dann wieder eine Zeitlang. Dann hat das Verfahren überhaupt generell relativ lange gedauert. Da gab es eine Reihe von weiteren Verfahren - hat einfach der zuständige Leiter aus dem Ministerium, hat keine Zeit gehabt. Dann war ich Schulleiter geworden. Dann bin ich es erst kommissarisch wieder. Bei mir wurde das Kommissariat relativ stark verkürzt auf ein halbes Jahr, weil ich Vorleistungen hatte, ich hatte schon bewiesen, dass ich es kann und dann wurde die Stelle für den Stellvertreter ausgeschrieben, ja, so und da waren auch vier Kandidaten da, zwei Frauen, zwei Männer, nur dann ist einer ausgewählt worden und dann hat ein Kandidat hat dann Rechtsmittel eingelegt vor einem Jahr. Dann ging's vor's Verwaltungsgericht, und dann musste es neu wieder, da ....das ist immer so, dann werden Formfehler entdeckt vom Richter, das ist normal so, ja. Dann müssen die Formfehler geheilt werden. Das hat ein Jahr gedauert und jetzt sind wir genauso weit wie vor

> einem Jahr. Jetzt sind wieder die Briefe rausgegangen, sie sind es nicht geworden und diese Woche ist die letzte Woche, wo der Kandidat Einspruch erheben kann. Ich bin neugierig, ich hoffe, dass bis zum Freitag kein Fax kommt, meistens kommt am Freitag um 11:00 Uhr so'n Fax, ne, dass Einspruch erhoben wird, Begründung folgt später. Und dann dauert es halt. Und so zieht sich das in die Länge. Es hat etwas lang gedauert, muss ich mal sagen, man hätte das auch schneller machen können. Aber manchmal sind das auch Sachzwänge, gelegentlich.

This illustrates the bureaucracy the vocational teachers have to struggle with. In the "dual system" the chambers and their Umbrella organisations as well as employer and employees organisation play a major role in the decision making concerning the content of the occupational curricula. The following quote describes a situation, where innovations in curriculum, instruction and assessment have been adopted before, where by that time criticised by the other players in the dual system, and then finally re-introduced under a another heading.

> Dieselben Leute verkaufen uns jetzt 40/50% muß sein. Bei Fertigungsmechanikern ist das so. Bei Mechatronikern ist das so. Sie müssen Arbeiten mit einbringen. D.h. wir werden nicht gefragt. Wir kriegen das vor 10 Jahren verboten so ungefähr, was wir wollten, daß wir Leistung mit einbeziehen, jetzt kommts, wir müssen es wieder machen. Also, immer hinterher laufen, ätsch ätsch so ist es richtig, aber nicht so wie ihr es wollt. Das ist das schlimmste und das ändert sich zu schnell. Dann sagt irgendein Kollege, bin ich denn hier bekloppt oder wie? Ich habe vor 10 Jahren Ideen gehabt und da haben sie mich abgeschmettert. Das führt zu... wir müssen dahinter sitzen, daß die Kollegen da mitmischen und auch sich engagieren. Es fehlt der Einfluß der Berufsschule, der entsprechenden Entscheidungsträger, dort auch der fachkompetenten Leute in den Gremien, daß dieser Einfluß, von den Betrieben sagen lassen, ob wir eine mündliche Prüfung oder eine schriftliche machen. Sehen Sie, da haben Sie gerade das andere Extrem.

> [...] Ja, Lernfelder sind verpflichtend gewesen bei den Mechatronikern und bei den Industriemechanikern. Das geht genau in dieselbe Richtung, wo Sie mich fragten was sind die Veränderungen. Wir haben es nicht erfunden, wir haben ähnliches erfunden, die kommen von außen. Die ganze Ernährung hatte hier Lernfelder schon, weil die Berufe in den Ernähungsbereich neu geordnet sind. Nur, das verrückte ist, jetzt wird von oben runter, vom DIHK, wieder abgepfiffen. Die Lernfelder kann man nämlich nicht prüfen.

What is also being mentioned in the former quote is the lack of influence, teachers have on those developments, even though being highly qualified and experienced.

What does that mean with regard to (international) standards?

At the beginning I promised to relate those findings to the question, which comes up from time to time, if there should be something such as international standards for vocational teachers and if that is possible, at all.

I think nothing speaks against that. It makes well sense to define sets of competencies, which are necessary to be able to apply related to the different tasks which have to be fulfilled by those teachers. However, I think that it needs some further research on the question what those tasks actually are. This small piece of research presented here tries to make a small contribution to that. Then, when it is possible to isolate different tasks of VET teachers more clearly, it might be sensible to adjust those standards to different sets of tasks (e.g. according to groups of students) – rather than to profiles, because the actual combination of tasks might be different from one national or institutional context, respectively, to another.

What I have not shown in this paper, is that there are actually a number of things, which are quite similar in the different contexts – the one which catches ones eye immediately, when skimming through the interview transcripts is the constant need for VET teachers to stay up-to date with technological changes in their respective domain.

However, what I hope to have shown is that another very important prerequisite of a "good" vocational education practice is, that there are the necessary institutional prerequisites, such as e.g. a sufficient room for manoeuvre for the teachers.

I am not quite sure if this can be well depicted in "standards" items such as envisaged by the protagonists of teacher standards (Oser, 1999). The research undertaken in one of the German Pilot Projects shows that the application of Quality assurance systems such as ISO norms to vocational schools is a controversial issue (Tenberg & Schelten, 2001). One solution would be to pinpoint institutional scenarios related to the fulfilment of specific professional tasks. Small stories, how such environments can look like, which can be used as objectives in vocational school development activities.

Those scenarios have to be constructed around two fundamental dimensions:

- Organisation of Conditions for professional Learning (a dimension which has always been stressed by teacher educators)
- and the Conditions for the professional Organisation of Learning.

The research such as described above aims at contributing to the empirical knowledge base.

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The European Perspective of HRD

Professionals as Flexible Workers or Portfolio People

by Graham Guest

Globalisation

In the space of just a few centuries the world has witnessed huge transformations. In some parts of the world we have seen agricultural societies come and go and industrial societies, as well as service societies, taking their place. In other parts these three types of society continue to co-exist. But the most dramatic change has been the growth of the knowledge society or learning society. This is truly global in nature; it functions increasingly through virtual networks and has powerful implications for the ways in which we learn and work.

For many people globalisation and the knowledge society feel uncomfortable, undermining their sense of security, but such developments can also be sources of optimism, bringing with them the possibility of enabling each one of us to optimise our potential and play our part as global citizens. Certainly we will go on tending the land, producing goods and supplying services, but our ideas of work and its purpose will, I believe, be radically changed.

"In a technologically advanced society where production of sufficient goods and services can be handled with ease, employment exists primarily for self-development, and is only secondarily concerned with the production of goods and services" (Harman and Hormann, 1990).

Learning and Development

To put these changes into a professional context I want first to consider continuing professional development (CPD), which I define as follows:

> ***The systematic maintenance and improvement of knowledge, skills and competence, and enhancement of learning, undertaken by a person throughout his or her working life.***

There is much debate, particularly among professional associations, about whether CPD should be optional or mandatory. Surely though we need to practise CPD in order just to keep up with changes in our working lives, let alone to keep ahead of them. One difficulty arises from the fact that we need to conceptualise CPD, thereby making it sound something special or separate from what we as professionals are doing anyway. This difficulty is compounded when our professional associations try to quantify CPD in order to incorporate it into their membership requirements. How can it properly be measured by points or number of hours? Does attending a lecture or reading a book contribute to our recognised CPD? If we are serious about measurement and assessment we need to find effective ways of measuring and assessing the professional's increased competence and what he or she has learned.

I believe that it helps to shift the focus from a concept having its origins in the world of professional updating, CPD, to one relating more closely to all aspects of our life, lifelong learning. Harman and Hormann again: "Finally, the old concept of education as job preparation is totally unsatisfactory from both the standpoints of the individual and society. For a host of reasons, lifelong learning is the only kind of education that makes sense. Thus, the workplace can also be considered as a learning place." So the concept of lifelong learning seems to have a clearer, more uncompromising meaning than CPD, certainly for the times in which we now live, and relates to our professional *and* our personal development.

But we need to change our negative attitudes to learning. Such attitudes have been shaped by various factors: social, political and psychological. School is something we are forced to attend and whilst there we have knowledge poured into us by a teacher who, by definition, knows more than we do. Learning therefore has been seen as a passive process and one to be avoided if possible. We are taught, educated and trained. We study something to get a qualification to match a job. We have some initial training and when we need some updating we go, or rather are sent, on a course.

It all sounds quite manipulative and yet back in 1971 Ivan Illich was saying that learning is the human activity which least needs manipulation by others. In *Deschooling Society* he had some perceptive and radical things to say about institutional learning. For example, "People who submit to the standard of others for the measure of their own personal growth soon apply the same ruler to themselves. They no longer have to be put in their place, but put themselves into their assigned slots, squeeze themselves into the niche which they have been taught to seek, and, in the very process, put their fellows into their places, too, until everybody and everything fits."

Peter Vaill (1996) pursues this theme. He says, "...institutional learning is likely to be answer oriented...", "Other institutional learning features of training programs are that program participants are assumed to be *qualified* to be there..." and "Behind these ideas lies the assumption that *learning is cumulative*..." Some of our irrational attitudes to education, training and learning can be seen daily in job advertisements. Typically employers ask for holders of specific qualifications: a degree, a diploma, and so on, regardless of the fact that the qualification might have been gained ten or more years ago. Even back in 1985 John Naisbitt was pointing out in *Megatrends* that scientific and technical information was increasing by 13% per year, which means doubling every five-and-a-half years.

Donald Schön (1987) asks, "Can the prevailing concepts of professional education ever yield a curriculum adequate to the complex, unstable, uncertain, and conflictual worlds of practice?" For Schön "...professional artistry is understood in terms of reflection-in-action, and plays a central role in the description of professional competence", whilst Longworth and Davies (1996) believe "Lifelong learning challenges the traditional university role as a repository of the intellectual capital of a nation and as a centre for research and excellence only."

New Patterns of Work

In the 21st century we cannot be certain of a job for life. It is certain however that we need to be prepared for job changes and for utilising new skills and knowledge at increasingly frequent intervals. More than that, the very nature of work and what it means to be employed is changing. The physicist David Bohm (quoted in Kofman and Senge, 1995), says, "Starting with the agricultural revolution, and continuing through the industrial revolution, increasing fragmentation in the social order has produced a progressive fragmentation of our thought." This fragmented way of thinking - breaking things down into their component parts - allowed Henry Ford, using Frederick Taylor's theories, to deconstruct work processes and produce more cars more economically.

New structures of work, learning and thought are needed if we are to survive and prosper in a world that is becoming increasingly chaotic and unpredictable. Consider just some of the ways in which the world is changing. Personal computers and mobile phones are commonplace items. Video on demand is already a reality, so that we can watch what we want when we want rather than relying on broadcasters to provide us with limited choices. Health services require more and more investment as patients demand increasingly sophisticated high-technology solutions to medical problems. We can access our bank statements and make money transfers while circumnavigating the globe - such is civilisation!

The knowledge society is based on the primacy of the whole, not the parts. We see this in new organisational structures based on a systems approach where, for example, job-specific hierarchies give way to multi-functional teams or networks and where work is more than simply a way of earning. Networkers operate in a world in which the model of the "cathedral", with its clearly defined but restrictive hierarchies, has been replaced by the more chaotic yet freer environment of the "bazaar" (Raymond, 1999).

So along with technological changes go changes in work structures, with individuals no longer having single jobs or roles, but rather a portfolio of work. Statements such as I am an engineer, I am a welder, I am a banker, I am an architect will, I predict, become outdated before too long. As Alan Briskin (1998) points out, "Role is a mental construct that is fluid and constantly changing because the world around us is also dynamic and constantly changing." We talk about multi-skilling and throughout our lives may have multi-employers. But why stop there when, as portfolio people, we are each our own employer? Denis Waitley (1995) says, "From the day you read this, I urge you to live by another paradoxical proverb:

You must act self-employed, but be a team player.

What this means is that you're your own chief executive officer. Start thinking of yourself as a service company with a single employee."

William Bridges (1997) pursues this idea when he says, "...you need to understand why traditional jobs no longer fit this world and why companies are abandoning them." He quotes Robert Schaen, the former controller of the telephone company, Ameritech: "The days of the mammoth corporations are coming to an end. People are going to have to create their own lives, their own careers and their own successes. Some people may go kicking and screaming into the new world, but there is only one message there: You're now in business for yourself." How prescient in the light of the accounting scandals that are helping to destabilise some of the world's largest organisations! There seems to be no question now about whether CPD and lifelong learning should be optional or mandatory - they are essential. Waitley is surely right to say "...never equate your personal long-term interests with your employer's." Unless of course you are your employer.

The new worlds of work and learning offer each of us positive challenges to co-operate with others to reach beyond the old paradigms of command and control. Flexibility is a key concept, but its extent must be determined by the individual. Whenever I hear the word flexibility used by an employer I am on my cynical guard, because I think the person uttering it may be wanting employees to do more work for fewer benefits - except the benefit of increasing his company's profits or his own share options, of course. If I am a portfolio person then it is I who controls my own flexibility and suddenly it becomes a positive self-empowering concept.

Work-Life Balance

Portfolio people are flexible within both their working and their personal lives. For such people the concept of the work-life balance, about which we hear so much nowadays, is meaningless because their work is firmly integrated with the rest of their lives and is about more than just earning money. Charles Handy (2001) refers to paid work as being just one part of our portfolio; others are home work (or housework), gift work (or voluntary work) and study work (part of lifelong learning).

Life is always presenting us with apparent contradictions and paradoxes. We are told that we can't have our cake and eat it; we must choose between this and that; we must decide upon work or life. A portfolio person however is comfortable with apparent paradoxes, believing in the importance of reclaiming work as an integral part of life and seeing it as interwoven with other aspects of what we are and what we do.

The inner life, so often neglected in today's world of materialism, is at least as vital as the outer. We need time, among all the routine busy-ness, to reflect on the priorities for achieving wholeness in our own lives whilst allowing others the same privilege. Maybe when we fully realise the illusory nature of the work-life balance concept we shall be on our way to becoming one of the socially transcendent people described by Marsha Sinetar (1986). They have:

- the ability to reinterpret the self more truthfully in the context of a whole world-view: individuals alter their way of seeing themselves, the way they relate to others, work and the community.
- the ability to manage resources - time, money, community services, etc. - creatively and efficiently. The individual starts to control the various resources of life rather than being at the effect of them.
- the ability to let go of conventional pressures for achievement, material goods, status symbols in favour of more intrinsically meaningful things, activities and goals.
- an ability to tolerate more ambiguity, change and not-knowing.
- the ability to merge self-and-other interests.

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An important aspect of Graham's work is consultancy on self-learning for success in the knowledge economy. He runs workshops and seminars on personal and professional development, writes articles and reviews for general and specialist publications, and makes presentations throughout Europe and beyond on issues relating to learning and the future of work.

A committed self-educator and lifelong learner himself, Graham has studied engineering, philosophy, psychology and education. His professional links include Fellowship of both the Royal Society of Arts and The Institute of Continuing Professional Development, and Membership of the British Register of Complementary Practitioners, the Scientific and Medical Network, and the Society for Philosophy in Practice.

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A Theory of Informal Learning at Work: implications for VET

Paper Presented at the European Conference on Educational Research 14.9.02, Lisbon

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Summary

This paper forms part of a larger project and detailed theoretical account of learning that will be published in the North American journal *Educational Theory*. By informal learning we simply mean learning that does not involve a designated teacher, instructor or trainer charged with the task of enabling the learning. We are concerned here with what might be called non-academic workplaces – the sort of places where people in the main use tools other than pens and paper – the sort of places where people learn through doing – they learn as they work. In these places many of the learning theories favoured by teaching and training organisations seem irrelevant. In these places learning seems closely connected with the ability to judge with ever increasing sensitivity to differing contexts. This paper offers a theory of such learning based in the work of MacIntyre and Dewey. We argue that this theory is also applicable to the way that people learn the practices of a society in general. In other words by concentrating on informal learning at work, we believe we get an important insight into learning in general. What might be called academic learning is merely a special case of learning and certainly not a paradigm case.

First we outline the theory

Second we consider some interesting cases.

Finally we invite readers to offer us examples of how the theory might or might not be applied in workplaces with which they might be familiar. Please contact

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Introduction

One very common basis for drawing a distinction between academic and non-academic learning is that the former type of learning is seen to focus on propositional knowledge, with the context in which the knowledge is applied appearing to be relatively unimportant. Whereas non-academic learning is more obviously concerned with judgements that are contextually sensitive. For example academic learning is often assessed by asking students to write in an approved way in a context – the examination hall – that is relatively stable, predictable and unimportant to the writing. Other types of learning are often best assessed over a longer period of time during which the learner has opportunities to show how she makes judgements that are sensitive to a wide-range of contexts that are much less predictable, for example in performance of many types of work.

We argue however that all learning involves knowing and judging with ever increasing contextual sensitivity and that examination halls, hairdressing salons, joiner's workshops and even production lines require context sensitivity in making judgements about how to act, whether or not action involves writing. For us, all learning is directed towards acquiring the ability to make good practical judgements. Academic learning is a special case of learning which relies upon the tools of pens, computers and paper and that this special case has come to dominate thinking about learning to the extent that learning to use other sorts of tools has become marginalised. We may all might be worse off as a result.

A genealogy of learning

It is important to recognise, amid recent talk of learning societies, learning cultures, lifelong learning and learning organizations, that it is not necessarily helpful to draw a distinction between learning and working. It is also important to recognise, amid growing talk of the credential society, accreditation of prior learning, accreditation of experiential prior learning and accreditation of work-based learning, that assessment too is part of living. Thus it is normal to learn and assess in the course of living. Such learning and assessment might be called informal learning and assessment.

It is not at all obvious that the formalization within educational institutions of what was previously informal is a good thing. It is worth remembering that people did all kinds of imaginative, useful and beautiful things long before there was talk of the sort referred to above. Great bridges, churches, houses, songs and so on came into existence long before it was fashionable to distinguish between work, living and learning in so sharp a way as is the case now. It is also worth remembering that such enduring creations were not products of the applications of theories, the purported precision of which guaranteed excellence in practice.

We reject the implicit rationalism in the theory guiding practice view of work and argue that good judgement at work and elsewhere cannot nor need not be precise in the ways implied by the rationalistic view. The apparent need for precision arises out of a mistaken view that academic learning of the rationalistic sort is a paradigm for all other forms of learning. For us there is no paradigmatic form of learning. All forms involve judgements which are typically fallible. Nevertheless, productive work proceeds on these less than secure judgmental foundations. For example we still cross bridges without undue worry that they are going to fall down even though their construction involves many practical judgements which anticipate future requirements in what must be imprecise ways. The point here is that in many cases at work and elsewhere judgements are made on the basis of experience of similar cases which err on the side of caution and there is nothing suspect about making such judgments. It does not imply slip shod work. The idea that practical judgment is always in awe of mathematical precision is mistaken. This idea skews our view of practical judgment as somehow imperfect. We want to argue however that the direct substitution of mathematical precision for judgment is a rarity and that attempts at substitution so often lead to poor practice in the form of over bureaucratic procedures and generation of a lack of trust.

Dewey's account of learning and its inherent contextuality

For Dewey, inquiry is initiated by the disruption of an habitual function. Inquiry is set in train by the individual being put into a state of what might be called bodily need from which it needs relief. This contrasts with traditional educational thought in which inquiry is the outcome of an intellectual puzzle or cognitive doubt. Therefore, for Dewey all inquiry is contextual in that it "is controlled, in part, by the constraints placed upon the inquiry by the context (situation) it seeks to ameliorate." Thus "inquiry is always practical reasoning that seeks means for securing desirable consequences in a given context."

The desirable end or consequence is a return to a state of smooth habitual functioning such as preceded the triggering of the inquiry but it needs to be stressed that for Dewey means-ends or means-consequences are not so readily separable. (Objective setting has limited function) Ends are contextual and revisable, apt to transmute into means for redirecting action. To capture this continuity between means and ends, Dewey introduces the notion of "ends-in-view". Ends-in-view are distinguished from ends in that they "are foreseen consequences that pre-interpret events and provide possibility. They allow us to act intelligently in the present." But while guiding present action they "require constant reinterpretation". However, once "achieved, ends-in-view become means or 'pivots', for directing, and redirecting, further action; they provide new beginnings.... Ends-in-view are the pivots or fulcrums for creative redirection *within* action". For Dewey then all reasoning is contextual. Ends and means are reviewed in context.

The Idea of a Practice

There is perhaps a most obvious, way of distinguishing contexts in terms of the practices that give them meaning. Thus it is appropriate to connect wires to terminal blocks within the practice of electrical installation, and that practice provides the context for understanding the activity of connection. MacIntyre distinguishes between two types of goods involved in practical activity: internal goods are those goods that can only be obtained through the particular practice. Typically they include those standards of excellence that partly constitute the practice. External goods are those goods, such as money and power, that can be obtained in other ways. We may imagine a tradesperson concerned both with standards of excellence internal to her trade and the rewards that her work brings. All work involves external goods such as money and internal goods that are realized in the course of trying to achieve standards of excellence which are partly definitive of our work.

Notice that we may use money, for example to enable us to learn some other practice and our work becomes part of some overall account of purpose and intention in which there will be competing claims on our attention. Moreover those claims may be seen to originate in practices that are not obviously related to work at all. It becomes clear that the context within which we make judgments at work can become very wide ranging through the exchange of internal and external goods.

In his most recent book MacIntyre extends the notion of internal and external goods to include goods that benefit human beings in general. In this way he suggests an even richer and broader notion of practice and an outline of how initiation into a practice might proceed. He recognizes that judgments may appear to be concerned with the achievement of external goods and that such goods may well be instrumental in achieving some other good within a practice or enabling participation in some other practice through which internal goods can be realized. For example someone may serve hamburgers to secure resources to enable them to pursue their hobby of sailing through which they realize goods internal to sailing. In that way the practice of sailing provides a context for understanding the activity of serving hamburgers. Alternatively the contexts for some judgments seem obviously related to a particular practice through the internal goods that are realized through that practice. Finally the contexts for some judgements may best be understood according to whether a practice does conduce to some overall sense of unity of purpose in life or tradition that is felt to be worth preserving.

The contexts for judgement are never entirely clear. Evaluation of judgements consists in "ends-in-view" under constant review and potential revision in the light of experience.

Significant learning is determined by the degree of sensitivity to context that leads learners to discern an experience as problematic in a way that will facilitate their educative growth. That does not mean that the most productive learners discern all experiences as problematic. Nowhere is this more obvious than in some workplaces where it would simply display a lack of contextual sensitivity to deliberate and refine tentative solutions to potential problems so that nothing else got done. Yet for MacIntyre and others it is an ability to evaluate at a distance as it were that distinguishes the good practitioner from the novice. There is a clear sense in which only the actor herself knows why she acts as she does. But there is also a clear sense in which it is only those with a wider view of what is good that are better placed to make such judgements. This suggests that novices commence their initiation into a practice by acting without reasons that go beyond personal wants and desires. They go on to be able to formulate reasons for action that relate to standards of goodness within the practice. Finally and through participation in other practices, they come to be able to imagine a future that is in some significant ways different from the present. They come to be able to ask "what else might we have done and how better might we judge in the future?"

Explicit and implicit context

This ability is related to the Deweyan distinction between implicit and explicit context. Explicit context refers to those features of experience that all learners recognise. Implicit context refers to those assumptions that learners have taken for granted, but which might be problematic. Dewey explains that:

> a person in pursuing a consecutive train of thoughts takes some system of ideas for granted … Some context, some situation, some controlling purpose dominates his

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> explicit ideas. ... Yet the fact that reflection originates in a problem makes it necessary at some points to inspect and examine this familiar background. We have to turn upon some unconscious assumption and make it explicit.

It is not possible to explain or predict precisely this inspection and examination however. That is because there can be no ultimate distinction between the processes and products of learning. Moreover an unconscious assumption may sometimes best be described as an expectation of a kind of feel. For example when a joiner hits a nail, she has an expectation both of how the nail will penetrate the wood and how the hammer will rebound off it in her hand. An attempt to drive a nail into new material may be the kind of problem that Dewey describes. In judging how hard to hit a nail with a hammer, there is an expectation which can be more or less refined in experience of what will happen. For many workers, a feel for a whole range of aspects of performance becomes habitual, implicit and not obviously the outcome of a judgement.

In all instances initiation into the practices of a workplace begins simply by copying others in pursuit of what must be external goods related to basic wants and desires. By comparing the consequences of such copying within and between practices, the learner comes to discriminate between good and bad reasons for acting in certain ways. She comes to perceive similarities between and within practices that enable her to develop some overall idea of what is worth doing and what is not. Through language she is able to compare her ideas and reasons with those of others. She comes to judge when it is wise to trust those others and when it is better to trust her own independent judgments. This process depends upon there being opportunities for her to participate with others in practical activities and for the consequences of some of these activities to be sufficiently determinate for her to develop some confidence in her ability to judge correctly. According to our argument, correctness here depends upon an appropriate discrimination between levels in what turns out to be a nested series of concepts.

Activities are located within practices which provide one context for their understanding. For MacIntyre the narrative of an individual life is to be understood against the background of the wider social context that the individual finds herself within. This wider social context consists of sets of practices which serve to exemplify virtuous conduct, and those practices, in turn are situated within traditions. Traditions are the repositories of standards of rationality.

Hence we may define a practice as that which includes any form of human activity that is identifiable by a single word or phrase, that is made identifiable through reference to some purpose and some community that shares a common way of doing things, and has a tradition of maintaining **both** internal and external goods. It is clear that there are degrees of complexity involved in practices that make bricklaying, for example, more likely to encourage the development of the virtues than brushing teeth, and that building is more likely to develop them than bricklaying. It is also clear that some practices may have become so dominated by external goods that the contexts for understanding their purpose may best be found within the tradition to which they are related. In summary, the interpretation of what humans do is related to the context that gives sense and purpose to what they do. These senses and purposes can be nested according to the interests of the interpreter. Moreover they often overlap. The more complex the activity, the wider the range of contexts within which the activity can be interpreted. Such activities are more likely to lead to productive learning. In addition those practices in which internal goods predominate are more likely to lead to productive learning than those in which external goods predominate. That is because virtue depends upon the realization of internal goods and such realization is most likely when it is easiest to detect what MacIntyre acknowledges as instances of 'appearing to be virtuous'.

It is important to note with Dewey that the seemingly endless potential to expand context to include every possible feature of the universe is blocked by the actual experience of the learner, not by any possible experience. Moreover the seemingly endless potential to expand interpretation indefinitely is limited by the actual interest of the interpreter, not by any possible interpretation. An example may be useful here. A joiner may develop good practice in the course of work in a variety of contexts, each of which shares some things in common with its predecessor but which also introduces novel features. There comes a point however when the context is stretched so far that we come to identify the joiner's practice as something other than joinery. So for example if the joiner starts to do some electrical work following the installation of a door frame because it is convenient to do so, it is normal to talk as if he were practising as an electrician rather than as a joiner. Plainly there is some overlap between practices when it is plausible to refer to contexts of either joinery or electrical work.

Judgement

Judgement then may be considered as one of the fundamental units of the nested concepts already introduced. Activities comprise multiple judgements, some of which may usefully be made explicit with reference to an explicit context. The reference to context enables us to make sense of judgement, to evaluate particular judgements and to suggest the sort of episodes, activities, practices or traditions that are likely to encourage productive learning. Good judgements are good precisely because they include the weighing up of the features of a situation that are salient, the balancing of those features, and the ability to perform with what might be called "the quality of seamlessness". This quality may be recognised in the experienced chef using her knife, the carpenter with her chisel and so on. The ability to make good judgments comes about, as Dewey tell us through

> Long familiarity with like operations in the past.

But what constitutes "like operations"? This depends upon those features of context we take to be criteria of similarity. It is the recursive quality of human activities made possible by a shared form of life that enables sense to be made of the notion of "like operations". While judgement about the appropriate features of context depends upon what others deem appropriate, those others can only deem what is appropriate because collectively people do act in particular ways. Hence the possibility of change and traditions in practice are mutually dependent. Reflexivity here involves not only a monitoring of how the judgement is made but also how others interpret the judgement and as we have seen that can be done with reference to any part of nested features of context. Indeed it is part of what it is to be human to be continually assessing one's judgement in relation to how others assess it and from whatever level in a nest of possible interpretations of context.

What this means is that there is no way of knowing in advance precisely what features of context are most likely to be relevant to the future interests of learners. A further example may be helpful here. To what extent does a trained hairdresser have to learn afresh her practice when she begins work in a new salon in a different part of the world from where she was trained, or even when moving to a salon within her own country that has a very different approach to the business of hairdressing. It is common to suggest that there are sufficient similarities between practice in one salon and practice in another, for it to make sense to say that her learning has 'transferred' in some way. However the notion of transfer suggests that there is a core to hairdressing that always subsumes a range of contexts within which hairdressing can plausibly be said to take place. This is incorrect according to our argument. Rather it is not possible to determine in advance which features of context will be most relevant to future practice in advance of that practice. It is this impossibility that prompts inquiry which is the first stage of learning. What has become a habitual practice is disrupted by the move to a new salon. Judgement is needed to identify those features of a new context to which she can relate through previous experience.

The only guidance that can be offered to the work-place curriculum designer or the worker herself who is hoping to prepare herself for future practice is to situate her judgements and activities in as wide a range of contexts as possible. It may well be important to recognise that in many cases the practice of hairdressing gives prime meaning to such judgements. A particular cut may be judged according to the norms of a particular technique, personal appearance, fashion or history or it may not be judged at all. Without sounding too grand about this, it is also possible to judge the cut according to the narrative unity of the hairdresser's life. This possibility highlights the potential of workplace learning for educational growth as Dewey describes.

Some Further Tentative Examples

The familiar notion of reflective practice may be considered as a kind of recursion in which different aspects of practices are compared with each other In his work on the nature of expertise Dreyfus writes of 'paying attention' to 'trust' 'vulnerability'. By 'paying attention' he might be taken to mean continuing recursion within a nest of contexts. The importance of 'vulnerability' or perhaps 'open-mindedness' is that such recursion is encouraged. The importance of trust is that it allows us to hold some things constant while others are under review. Consequentialist moral thinking requires recursion which takes the form of a kind of projection 'what would happen to x if y took place. In other words reflective practice for Dreyfus is almost a way of being in that without trust and vulnerability, there is not possibility of recursive thinking – it is a practice with prime moral intent and not a technique.

Consider the example of someone in a health care context being deemed to be in need of 'communication skills' or 'training' because of the way that they communicated with a patient. Attention to context would have revealed however that they had forty patients waiting elsewhere. This illustrates the way that skills talk and narrow conceptions of workplace learning are crude attempts to externalise internal goods. It also reveals what might be regarded as an important feature of an educational as opposed to training programme. We do not want to make too much of this distinction but it does serve as an attack on the kind of simplistic calls for relevance, for practical consequences, and of anti theoretical talk generally. Theory provides a very important layer in the nest of contexts required of any accomplished practice.

Consider an example of classroom judgments. A main reason for many of us believing that courses of theory provide essential contexts for making good judgments rather than 'classroom skills' type courses is because the latter provide an inpoverished and narrow context - only the first part of the nest. This is relevant for schemes of teacher evaluation. Observation really does fulfill only part of the evaluation. There is a need to talk and require justifications. There is also the need to sustain a tradition of critical educational inquiry to keep alive a tradition of educational evaluation.

Of course the Schonian reflection in action and reflection on action distinction may start to dissolve for us and this leads to entirely new accounts of 'reflective practice' than the one that informs most courses of teacher education. Schon seems to miss the point about context in our opinion. There is not one dimension (time) that is important. Time is one among many.

There seems to be a widespread feeling articulated at the session at which this paper was presented that the work of Lave and Wenger has become too influential in that the notions of situated learning and communities of practice are insufficiently theorised. Our work supports this feeling. For us these notions are highly problematic because of the levels of context described. It is never clear and it is essential for learning that it is never clear just where in a nest of contexts learning is situated. Similarly the notion of community must be unbounded in a way that problematises talk of a 'community'.

The example offered in the session of the work of morgue attendants is useful. It seems that morgue attendants use humour to help them with their work. While our traditions relating to death enable us to understand this and to imagine a context in which it is appropriate. It is plainly not appropriate when counselling the relatives of the deceased. It seems that such counselling is becoming an increasing part of the work of these attendants. Learning here may usefully be explained by the theory outlined in this paper in that it involves judgments made with ever increasing sensitivity to context which range from social traditions which make humour intelligible and acceptable, through monetary rewards, to discrimination between the context the relative brings to the counselling encounter. It seems that no attempt at an atomistic notion of competence could ever capture this complexity and the dynamic nature of the work practice itself.

Finally we try to make an important point about context that helps us to move away from what might be called an intellectualist myth. It is not that nested concepts always involve theory as theory is commonly conceived. Consider the craftsperson at work as Heidegger might describe. Here there is a seamlessness and unhesitating quality about movements that seems to defy analysis in terms of recursion and nesting. That appearance is misleading however because in this context the recursions are more concerned with the feel of the materials, the tools and an idea of what the finished product might look like, its function, its aesthetic qualities and so on. The seamlessness described earlier comes about because of the familiarity with the relevant aspects of context and the way that recursion is built into the practice itself. The intellectual notion of theoretical reflection is irrelevant here.

Conclusion

On the face of it, context is determined by the practice that makes the judgment meaningful. But the relationship is not so straightforward for at least three reasons

1. Practices overlap

2. People are not only concerned with doing a job well but also the rewards that their work brings and such rewards may enable them to learn other things that interest them more. For many types of work this is probably the case.

3. There are levels within practices as outlined. Multiple judgments comprise and activity. Practices are comprised of activities. Traditions are comprised of practices which provide an overall social context for work.

People learn at least in part by becoming familiar with similar contexts but the notion similarity is also problematic. Humans have a capacity for reflective engagement. This enables them recursively to compare similarities across and between levels. Such recursion is enabled in trusting relationships because recursion is more difficult if not impossible if we cannot trust our colleagues to tell us the truth most of the time. Some things have to be held constant in order to make progress in a series of recursive possibilities.

Listed above are some tentative examples of the implications of the theory outlined for VET. We would welcome further examples that might illustrate the theory further. Please contact j.s.halliday @strath.ac.uk

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ECER 2002: Symposium on HRD in Europe

Gender specific key qualifications for working life

Thesis

The awareness for gender issues must generally be raised to draw the attention to necessary but also non necessary gender specifications of competencies and in jobs and occupations.

The aim is not to judge or put all on equal terms, but to make generally aware of individuality and gender issues.

We neither want to pretend that men and women are equal or want them to be treated equally, nor do we want to emphasise the differences so that the gap between men and women and their actions become larger. What we are asking instead is that they learn from each other and take over those things that appeal to them, no matter whether male or female, and to develop those further in the sense of mutual learning.

Above that it should be noted that "male" and "female" competencies always refer to an artificial "average" person. Everybody will display more or less male or female features with respect to different dimensions of competencies. People should be supported in developing their strengths, regardless of their sex. One should try to avoid "reducing" them to the presupposed "average" or "typical" woman or man.

Exposition

This thesis is based on the outcomes of the European project "Gender and Qualification. Transcending gendered features of key qualifications for improving options for career choice and enhancing human resource potential" and the recommendations developed by the research partners.

The project started out with the question of key competencies, which were examined in a typical male occupation (electrician), in a typical female occupation (nursery nurse) and in a gender mixed occupation (waiter/waitress). Respective data were collected by observations, interviews with teachers, trainers, employees etc. and analyses of relevant documents.

1. Introduction

Competencies are generally "labelled" as masculine or feminine, but in the end there are cross-occupational core competencies that appear by both men and women alike. The main key competencies found through research are e.g. sociability, organisational competencies and skills, handiness, patience and neatness (cf. Finnish recommendations). They are mainly defined by the collectives at workplaces, schools and by professionals and they come into being in collective and personal development processes. The question arising from this is: how and where (private life, educational institutes, work-sites) can individuals be encouraged to identify and to acknowledge different competencies that are valuable, necessary and possible to develop for occupations and for people of both sexes. Segregation as we still find it today in society and occupations makes it difficult for the individual to identify and to develop competencies in the best way according to their own potentials. We all grow up with stereotypes, some more, others less, and there are "natural" typical male and female jobs when it comes down to physical strength. Over-representation of one sex in an occupation is not considered to be negative, but most of the time it is strongly influenced by the environment and therefore not "natural" to the full extent (cf. Greek recommendations).

Another question is the role of women in the labour market, especially women returners after family phases. The Greek partners formulated it this way (and this statement can be transferred to many other European nations): a valid model in society shows men as breadwinners and women as housewives. The differentiated version today sees the women "helping" men earning the family income while men "help" the women in household duties. The influence of this model on the labour market is changing though, e.g. as a result of female education. Moreover must the general conception change towards an acknowledgement of competencies gained during family phases, so that it becomes (to employers but also to women themselves) clear that there is no necessity that the majority of these women takes low-paid, "female" jobs.

2. VET and labour market practice

The field of gender in VET and labour market practice stretches from the choosing of career pathways to the treatment of exceptional cases and women returners.

A common observation of the partners was the need for mutual learning and a need for a better identification and acknowledgement of competencies.

2.1. Career choice process

This was one important issue for the British partners that appeared in their research with the exceptional cases. The rigid, set and narrow experience of or structures for exploring and undertaking career pathways is a major problem. Research has shown in all the countries how deeply embedded stereotypes still are in society. The exceptional cases show though, that it is well possible to overcome occupational sex role stereotypes and learn, train and work well in non-traditional occupations.

Another issue was seen in the attitude of gender indifference and insecurity of trainers and tutors. If this is the case they can hardly take over a supporting role in this developmental stage and time of career exploration for the young people. This emphasizes the need for integrating gender awareness in teacher training and justifies the training of exceptional cases as mentors and teachers.

Especially the Finnish and the German partners asked for the development of new didactical and methodological solutions for school and VET, e.g. an educational subject for men and a technical subject for women, teamwork of women and men and reflection afterwards, student exchange and student co-operation of traditional male and female occupations.
We neither want to pretend that men and women are equal or want them to be treated equally, nor do we want to emphasise the differences so that the gap between men and women and their actions becomes larger. What we are asking instead is that they learn from each other and take over those things that appeal to them, no matter whether male or female, and to develop those further in the sense of mutual learning.
This would give all students a broader field of experience and judgement of their interests and competencies when it comes to the choice of occupation.
Later in VET institutions an exchange between occupations can take place as a part of the training so that students can explore and try their competencies during their studies.

In order to disseminate the idea and practice of mutual learning training courses for teachers and trainers must be established. They must be designed to enable them to use such didactical and methodological models or to develop suitable models for their students themselves.
These training courses could be developed in research projects and should be accompanied by research respectively. The results of the co-educational research must be taken into consideration here.

The Greek partners stated that 'vocational guidance' is crucial to help young persons to match their personality and wishes with a suitable educational and occupational choice and at the same time to limit gender stereotypes. A continuing guidance would also help to limit the influence of those parents, who lead their children into fulfilling their (the parent's) unfulfilled dreams.

The Portuguese partners suggested moreover that VET institutes themselves promote and step in for a wider opening of typical male and female occupations to the opposite sex through information sessions and brochures. This needs to be matched with the needs of the job market though. Especially women (students but also women returners) should be informed about opportunities in training in the area of the new technologies, so they are not excluded from 'information society'. Concerning information policies it is a British request to inform students better about potential earnings as they often have no idea about what their future income might be. Considering that females traditionally choose low paid occupations better information about the prospects (and about other choices) could 'challenge the pattern'.

2.2. *Exceptional cases in VET practice*

It is the general opinion that a special support of exceptional cases should take place during VET by mentors who have ideally made the same experiences. This mentor-position and/or teaching tasks can later be passed on to the exceptional cases. They can draw more attention to and raise gender awareness and point out the difficulties as first-hand information. It is ideally the task of exceptional cases to sensitise enterprises (male- and female-dominated) in order to prepare them for exceptional cases via discussion and lectures about experiences in other enterprises.

Based on their research with the exceptional cases the British partners formulated important issues that need to be considered in this context. First of all there are narrow possibilities for exploring and undertaking career pathways as already mentioned. The second issue was the problem of gender-blindness in VET, where gender issues and the question of how to deal with gender differences and roles does not arise. Gender and the exceptional cases are not an issue and therefore there seems to be no need for special attention or actions. Finally there is the importance of the "lived experience of gender". The confrontation with gender issues shapes and changes stereotypical conceptions, as the concept of gender is both 'taught' and 'learned' throughout life. (Cf. UK recommendations, pg.1)

To proceed to a "gender inclusive approach" VET needs first of all to recognize the problem/the phenomenon or to overcome a "gender tiredness" of many tutors and trainers in memory of former gender programs. Furthermore the view that 'gender' equals 'feminism' needs to be overcome.

Above that it should be noted that "male" and "female" competences always refer to an artificial "average" person. Everybody will display more or less male or female features with respect to different dimensions of competences. People should be supported in developing their strengths, regardless of their sex. One should try to avoid "reducing" them to the presupposed "average" or "typical" woman or man.

3. Policy making

Especially the Finnish partners emphasized the importance of making policy makers and administrators conscious of gendering and create thereby a readiness to take decisions. Based on their initiative a better co-operation between educational institutes, work organisation and administration concerning this topic can be reached. This is the first condition in order to establish the gender - question seriously and work effectively for an improvement in any field. This is also the level where political and administrational solutions are developed and carried through for

- the recruitment and training of teachers and trainers (with exceptional career choices) in the different branches as supporting persons for the exceptional cases
- the construction of curricula and teaching materials that promote awareness and
- the emergence of research programs in working life and education

In this context the Finnish partners mentioned the inclusion of trade unions and labour market organizations as the recognition and valuing of different competencies and skills manifests itself in contracts on salaries and wages. From their side programs can also be started that dissolve the gendered rigidities of competencies and skills. Moreover can they support the recruiting of exceptions.

With the policy makers lies also the responsibility to create attractive working conditions for parents. The Greek partners mentioned in this context also the Common European Employment Policy whose guidelines call for a better reconciliation of work and family life. The indicator is measured by the coverage of children aged 0-5 by nursery nurses and kindergartens. This implies that the policy aims mainly at women who are then able to participate more actively in the labour market. The Greek partners criticize the policy in so far as it takes for granted that better nursery nurses' facilities would facilitate the employability of women, which is not true e.g. for Greece. Here it is strongly believed that children should be raised by family members or employees until the age of 2 or 3. As a consequence the policy could be more progressive if it encouraged e.g. the involvement of men AND women in the household and engaged more in employment friendly labour relations (less working hours (private vs. public sector), more generous paternal leaves (in terms of time and money) for both parents, rotation schemes and flexible working arrangements). The request for more generous parental leave schemes corresponds with the German request for a (financially) more attractive family phase for both men and women. Shared and therefore shorter family phases would also reduce the problem of job-returners' re-integration into the labour market.

3.1. Curricula

When raising gender awareness at work and in school and promoting it in teacher training the consequences for curriculum contents and didactics must be taken into consideration. It is important to avoid a separation on curricular or pedagogical practice. Again: The aim of gender awareness is not to emphasize the differences between men and women and to extend the gap between them but to acknowledge and support competencies.

When taking up the gender-question in curricula it is also necessary that books and other educational material are further improved in terms of gender models.

4. Social life

A person's social life has a major impact on shaping a concept of gender. This starts in the family in early years already. As a consequence there is also the family's gender awareness that needs to be raised in order to prevent them from supporting the development of stereotypes. The father plays usually an important role in this context, and it starts with simple things as e.g. that all family members help in the household. The family can also support a non-stereotypical conception by supporting "experimental life", i.e. giving encouragement to male/female hobbies etc. (Cf. Finnish and German recommendations).

To raise family awareness to this topic it is necessary to make it a topic in the field of child raising, holding lectures in kindergartens and schools and to make it public through media.

Next to the family it is also the media that play an important role in producing gendered notions. They also support often gendered images of workplaces. They can though be used to work in the other direction, i.e. to change the gendered image of competencies and to step in for gender awareness. The Portuguese partners suggested campaigns presenting successful exceptional cases, the circulation of information about the legislation on equal opportunities, debates and studies about 'typical' and 'exceptional' cases and the implementation of policies and actions aiming at the encouragement of men in family life, which can be all be promoted and made public via mass media. The aim though must not be to emphasize the exceptional cases in a special way but to make exceptional cases more "normal" (cf. German recommendations).

Finally the table on page 7 gives an overview over aspects responsible for gender segregation which are regarded as changeable or not changeable by VET practice or VET policy.

Tab. 1: **Changeable and non-changeable aspects responsible for gender segregation by VET practice and VET policy**

CHANGEABLE

CHANGEABLE BY VET PRACTICES

- images of occupations, ascription of occupations either to women or to men and male or female abilities[1]
- low degree of social assessment of occupations (nursery nurses, waiters/waitresses)
- images of or prejudices against women's or men's abilities, competences etc.
- cultural history and development of occupation can be worked on and reflected and can be compared with current situation
- a balanced distribution of female and male teachers, employees, tutors etc. for role models, different ways of teaching and acting etc.
- female tutors for girls/women in male occupations and male tutors for boys/men in female occupations for support
- supporting special male and female abilities, competences etc. with both girls/women and boys/men
- supporting awareness of individual - perhaps gender specific - abilities, competences etc.
- raise awareness for typical male and female behaviour (e.g. anti-women and sexist jokes) ?
- understanding of typical male and female behaviour; not to take sexist patter personally

CHANGEABLE BY VET POLICY

- images of occupations, ascription of occupations either to women or to men and male or female abilities
- low degree of social assessment of occupations (nursery nurses, waiters/waitresses)
- both sexes have to be addressed clearly in ads, brochures etc.
- a balanced distribution of female and male teachers, employees, tutors etc. for role models, different ways of teaching and acting etc.
- female tutors for girls/women in male occupations and male tutors for boys/men in female occupations for support
- employment practices

individual

systemic

NOT CHANGEABLE BY VET PRACTICES

- cultural history and development of occupation (but: cf. above)
- low wages

NOT CHANGEABLE BY VET POLICY

- cultural history and development of occupation
- labour division in society

NOT CHANGEABLE

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[1] Male abilities, competences etc.: to be the bread-winner, competitiveness, strong determination, orientation towards fixed rules, autonomy, referring to own interests

Female abilities, competences etc.: caring for others, co-operation, communication, flexibility, to take different roles / ambiguity tolerance, creativity, responsibility for others

(cf. Friese 1994, 410-415; Helgesen 1992, 46-49)

The interviewees did not mention these concrete abilities, competences etc., but mirrored general assumptions.

Learning Organization in a Pre-accession Country: Vision or Reality?

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Learning organization is a state every organization should be wishing to achieve, if it understands how to act successfully in the knowledge society. It should be acknowledged, however, that a learning organization is a construct, and not a naturally settled social phenomenon; therefore, it requires effort to develop an organization into a learning organization. This demands different kind of resources; apparently, first of all – competence of contemporary management (including knowledge management) and a democratic tradition (firstly, necessary for the employees participation in organization, as well as for partnerships, etc.), both of which are problematic in countries undergoing transition to a market economy. Moreover, ten of these countries are the present candidate-countries to join the EU. It means, they have to undergo some fundamental and fast development to enable a fully fledged membership in a club of developed countries. It has been demonstrated more than a decade ago that organizations would be able to rapidly develop in a changing environment, if they were learning organizations (Senge, 1990; Pedler, Burgoyne, Boydell, 1991, Kreitner ir Kinicki, 1995, etc.). So, pre–accession country organizations have to become learning organizations. On the other hand, these countries lack democratic traditions and their organizations have problems in possessing the contemporary management culture and competence. Does this allow to expect that in such a situation the characteristics of learning organization could occur in the organizations of the above mentioned countries? How could the exposure or absence of these characteristics be interpreted? What type of organizations (business or non-profit) might be found as being more successful on the way to a learning organization?

This work aims to answer some of these questions. The article consists of three parts. In the first part a concept of a learning organization will be presented. The second part deals with the research methodology of learning organization, the presentation of the organizations researched and the survey itself. In the third the research data will be presented, analyzed and discussed.

1. The concept of learning organization

The concept of learning organization has been a target for many researchers for a several decades. The research works have been simultaneously carried out even by several schools[1], and later by C. Handy (1991), Pedler, Burgoyne, Boydell (1991), Beck (1992), Wick and Dodgson (1993), Garvin (1993), Stoll, Fink (1998) and other. These research works enable to highlight the general concept of a learning organization: this is an organization that empowers an individual's learning, team learning and organizational learning (the latter leads to the shared understanding in the organization) to the extent of the whole organization. Such learning requires the particular conditions, especially managerial and educational, that are highlighted by the learning organization characteristics provided by different authors.

Pedler, Burgoyne, Boydell (1991; p 26-27), with a particular stress on management aspect of functioning indicate eleven characteristics of a learning organization: 1 The learning approach to strategy. 2 Participative policy making. 3. Informating. 4. Formative accounting and control. 5 Internal exchange. 6. Reward flexibility. 7. Enabling structures. 8. Boundary workers as environmental scanners. 9. Inter-company learning. 10. Learning climate. 11. Self-development opportunities far all.

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[1] Argyris and Schön's (1985) book "Action Science", Senge's model of a learning organization; Revaus "ABC of Action Learning" – all these works could be considered as the research that initiated the concept of a learning organization..

Neegaard (1994; p.60) revealed the similar characteristics with a special emphasis on the learning process itself: the ability to continuously transform/improve itself; existence of a learning culture and climate; existence of, and encouragement of, individual and organizational self-development; the occurrence of adaptive and generative learning (i.e. learning takes place on different levels); systematic change processes, "high" participation, "high" innovation; integration of learning and development in daily performance; clear visions of where the company wants to go; systematic use of learning processes.

Kline and Saunders in their book "Ten steps to a learning organization"(1995) make a strong statement on such characteristics of a learning organization as systematic thinking, a shared vision, partnership and learning empowerment.

It seems quite difficult to manage such a diversity of characteristics. Nevertheless, is it possible to find out the only or two essential characteristics of a learning organization that would be crucial for the development of contemporary organizations in an ever changing environment and the absence of which would not allow an organization to become a learning organization. And how about the *organizational learning* that is the process by which the *organization's* knowledge and value base changes, leading to improved problem-solving ability and capacity for action (Probst 1997, p. 15)?

Obviously, organizational learning takes place through the medium of individuals and their partnerships, but the organizational learning as itself is a learning by a social system that cannot be equated with sum of the learning processes undergone by individuals, and the outcomes of these processes.

If the organization at the level of social system has to develop its knowing, the learning "perpetum mobile", which is the unique nature of a learning organization, needs to be activated. So, if we wish to refer to a holistic learning organization, it has to be characterized not only by learning individuals, but by organizational learning as well.

If an organization emphasizes the individual learning instead of organizational one, in that case this particular organization is only on its developmental way towards a holistic learning organization. If an organization is characterized by a strong organizational learning which conditions a continuous development of organizational understanding, then such an organization could be considered as a learning organization.

2. The learning organization: research methodology and survey

Two types of organization acting in Lithuania that is the pre-accession country were selected for the research: a) business organization (in electronics industry); b) schools.

The research in business organization has successfully applied so called *'Blueprint' Methodology* by Pedler, Burgoyne, Boydell (1991; 25 - 27), consisting of 11 characteristics mentioned above, each of them is split into 5 criteria. This methodology was employed for the questionnaire construction, on the grounds of which the survey under supervision of the author of this article was carried out in one of the biggest and most successful Lithuanian electronics enterprise, situated in the fourth biggest city of Lithuania. The choice of this successful Lithuanian enterprise was not accidental, because the following *hypothesis* was constructed: if the enterprise managed to enter the Western markets and to develop intensively in a considerable short period of time, it has to possess the qualities of a learning organization. So, the joint stock company was chosen which was registered in 1994 after the privatization of state owned factory with the same profile. The history of the latter starts in Soviet period (in 1962). Today 57 percent of the stocks are owned by foreign investors and 3655 people are employed. The annual turnover in 2001 showed that this joint stock company was one of the leading enterprises among small and medium product producers in European market (on a Lithuanian scale – it is a large enterprise) and occupied 12,2 percent of the European market. 85 percent of production is sold to West Europe. The system implemented in this enterprise meets the production quality management certificate ISO 9001.

The enterprise has seven large subdivisions, the employees are divided into four categories according to the functions attributed: managers, specialists, administration staff, workers.

The aim of our research was by means of questionnaire survey to investigate the opinions of individual members of organization on what characteristics of a learning organization do manifest themselves in the subdivisions.

The questionnaire consisted of 55 statements that reflected the indicators of 11 learning organization characteristics (each characteristic was defined by 5 indicators). The respondents have to evaluate if a certain feature manifests in their organization. Every approval received one point. So, if a respondent claimed that a concrete characteristic does not manifest, in that case its value equals zero, the maximum expression of the value is 5. The maximum number of points for all learning organization characteristics is 55, and the minimal – zero. Figure 1 shows the average of respondents' answers.

The clusters of no less than 30 respondents were aimed to be analyzed, however, some particular groups of the employees in a certain subdivisions were smaller (see table 1, the data on respondents are highlighted). The total number of employees surveyed is 598, among them were 162 managers and administration staff, 225 specialists, 204 workers. The respondents are quite well educated: only 7 of the total 598 have unfinished secondary education, the rest have completed high or higher education university degree. This is a common tendency in this enterprise.

Table 1

Respondent distribution by characteristics

Respondents	Subdivisions							Total in the company
	A	B	C	D	E	F	G	
Total	232	90	54	44	25	63	90	598
Managers	66	31	10	4	8	13	30	162
Specialists	84	29	16	23	16	27	30	225
Workers	81	30	27	15	1	20	30	204
Skilled	59	21	19	8	1	13	20	145
Unskilled	19	9	7	7	0	6	10	59
Average age	39,73	42,81	41,70	40,30	42,80	39,24	45,36	41,35
Men	146	63	26	23	6	30	72	366
Women	86	26	28	18	19	33	18	228
Education								
Unfinished high	0	1	0	2	0	1	3	7
High	22	8	7	5	1	11	7	61
Vocational school	15	5	5	5	0	5	3	38
Special high	66	20	18	15	8	18	22	167
Unfinished higher education	9	1	1	4	0	2	1	18
First degree in HE	105	53	22	13	14	23	51	281
Completed graduate studies	15	2	0	0	1	3	3	24

Another group of organizations, i.e. schools as learning environments, is analyzed by applying the meta analysis of research data accomplished by Simonaitienė (2001). The research involved 17 schools located in 8 Lithuanian regions. 554 teachers, 477 pupils and 46 experts took part in this research.

This author investigated the schools maintaining the core of *'Blueprint' Methodology* in the sense that her research revealed 8 from the 11 possible characteristics. Simonaitienė enriched the list of characteristics by the specific features of a school as a learning organization indicated by other authors (Stoll and Fink; 1996, Leithwood, 1996; Addlesson, 1995; Senge et all 1990, 1994). The methodology by Simonaitienė is different from *'Blueprint' Methodology* in the sense that the rating scale for evaluation was from 1 to 5 (1 – no problem, 5 – a big problem). Moreover, the accomplished research is special because the questionnaires for teachers and pupils were composed separately: one part of the questions was the same, and another part was different. To make the meta analysis not so complicated I

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will only deal with the teachers' answers. So, the schools' analysis will be restricted to a teacher organization.

Therefore the direct comparison of research data on the enterprise and school as the learning organizations is impossible, although some parallel could be considered.

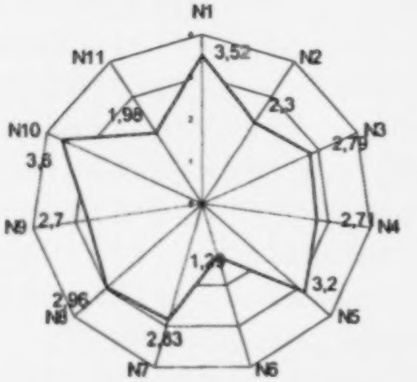
The Western countries authors (Senge, Cambron – McCabe, Lucas ir kt., 2001; Aspinwall, 1998), have noticed that business organizations are more advanced on the way towards a learning organization than educational organizations. This is because the latter are more conservative for their traditional mission.

3. Is the learning organization in a pre-accession country a reality: findings and interpretation

The research in one of Lithuanian electronics companies

The summarized data on the respondents' recognition of learning organization characteristics in the enterprise is presented (see figure 1). Note: the expression of characteristics in separate subdivisions was basically similar.

As it was mentioned in the second part of this article, the most important characteristics of a learning organization are those which emphasize the organizational learning and the development of its conditions. The individuals' learning and the development of conditions ensuring this learning are also important.



N_1–The learning approach to strategy
N_2 – The participative policymaking
N_3 – Informating
N_4 – The formative accounting and control
N_5 – Internal exchange
N_6–Reward flexibility
N_7 – Enabling structures .
N_8 – The boundary workers as environmental scanners
N_9 – Inter–company learning
N_{10} – Learning climate
N_{11} - Self-development opportunities for all

Figure 1. Learning organization characteristics in one of the Lithuanian electronics companies

So, among eleven *Blueprint' Methodology* characteristics the attention should be paid to N1 characteristic which is directly targeted to organizational learning - the learning approach to strategy. Figure 1 clearly indicates that this is the second biggest feature of this enterprise in terms of the expression (N_1=3,52). The respondents recognize the characteristic of learning climate more strongly (N_{10}=3,6), the latter could be considered as the most general characteristic of a learning organization that reflects both the personal disposition of organization members and the organizational attitudes towards the learning in the organization. In fact, it could be assumed that *learning climate* characteristic could be treated as more holistic. It could be influenced at least indirectly by the characteristics of condition development for learning in an organization. If it happened, then the expression of characteristic of *self-developmental opportunities for all* would be similar to that of *learning climate*. However, our survey data reveal a quite contradictory situation: the respondents make a very reserved evaluation on *self-developmental opportunities for all* (N_{11}=1,98), in comparison with a highly appreciated *self-development climate* (N_{10}=3,60). Most probably, *self-development climate* should be treated as solely psychological category which reflects human disposition to learn, the individual and organizational learning efforts. It is proved by the similar expression of two characteristics: *learning approach to strategy* (N_1=3,52) and *learning climate* (N_{10}=3,6). Since the expression N_1 is slightly bigger than N_{10} (although this is insignificant difference), it could be carefully noted that the individuals' learning somewhat prevails over organizational learning. This finding even reinforces the remark made in the first part of the article that organizational learning is more complex and not easily achievable quality comparing with the learning of individuals. It is necessary to note that the employees of the enterprise in question recognize the characteristics of a learning organization which are related to communication, information: *internal exchange* (N_5=3,2); *boundary workers act as environmental scanners* (N_8=2,96). The learning *enabling structures* (N_{11}=2,83) received a quite satisfactory evaluation as well.

Unfortunately, as it was mentioned before, the *self-developmental opportunities for all* (N_{11}=1,98), and especially *reward flexibility* (N_6=1,29) are insufficient.

According to the data received, it is possible to claim that the employees of the enterprise in question find out some of the characteristics of a learning organization; the special focus is on the existence of positive psychological attitudes both to individual and organizational learning (N_1 and N_{10} are bigger than 3 points).

The lack of equal *self-developmental opportunities for all* proves, most probably, is the general problem of pre-accession countries: the shortfall of democratic traditions and traditions in contemporary management. Another management problem is the lack of reward flexibility which could be solve quite successfully because it is the problem of managerial competence and not the shortage of financial resources. The shortage of managerial competence could be related to such problem as lack of employees' participation in the policy formation (N_2=2,3). But we have no right to claim that the lack of managerial competence is a total deficiency in this enterprise, while evaluating from the learning organization perspective: enterprise management solve the problems of communication and information in a rather suitable way.

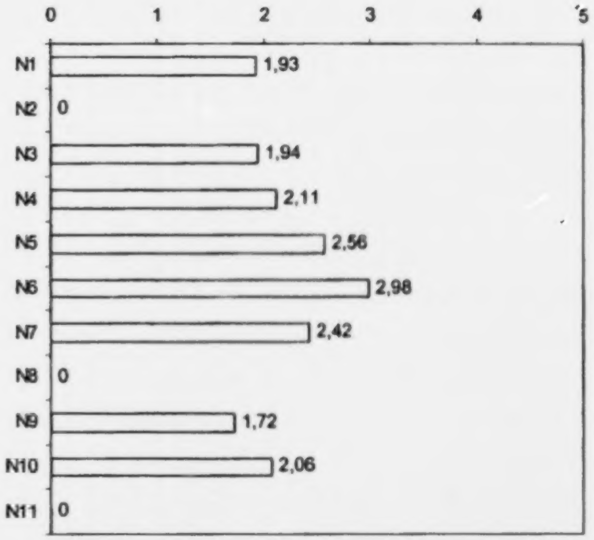
The total sum of all evaluations of 11 characteristics makes 29,88 of possible 55.

The survey data enable to draw the following conclusion: In general the employees of the enterprise engaged in the research maintain more satisfactory rather than indifferent position towards the expression of learning organization characteristics in their enterprise. Moreover, it could be claimed that the enterprise engaged in the research is advanced in its way to learning organization.

A learning organization in Lithuanian school: meta analysis

The metaanalysis will be provided using some of the data from Simonaitiene's (2001) work. The 8 characteristics from eleven of *'Blueprint' Methodology* will be presented (see Figure 2).

The teachers think that lack of *reward flexibility* is the only problem that impedes the learning of teachers in the organization (N_6=2,98, when max=5). Despite of the different kind of methodology, *reward flexibility* was also revealed as the biggest problem among the other *'Blueprint' Methodology* characteristics in our researched enterprise. No doubt that the case of schools is more understandable one: It is a form that teacher salary is fixed and this allows little flexibility in stimulating teachers' learning.



N_1–The learning approach to strategy
N_2 – The participative policymaking
N_3 – Info mating
N_4 – The formative accounting and control
N_5 – Internal exchange
N_6 –Reward flexibility
N_7 – Enabling structures
N_8 – The boundary workers as environmental scanners
N_9 – Inter–company learning
N_{10} – Learning climate
N_{11} - Self-development opportunities for all

Figure 2. The meta analysis of shools as teachers' learning organizations

The observable, while not very big, problems for teachers are *internal exchange* (N_5=2,56) and *learning enabling structures* (N_7=2,42). The respondents recognize even such small problems as *the learning approach to strategy* (N_1=1,93); *informating* (N_3=1,94); *formative accounting and control* (N_4=2,11); *inter-company learning* (N_9=1,72); *learning climate* (N_{10}=2,06).

So, if we relied on this partial view of the average data on learning organization, it would be possible to claim that the school teachers researched by Simonaitienė are minded to detect a big part of learning organization characteristics despite of some implementation problems. It seems likely that there could be even bigger problems, if all the characteristics were under investigation: namely, *participative policy making* (N_2); *boundary workers as environmental scanners* (N_8); *self-developmental opportunities for all* (N_{11}).

Regardless of this scepticism, it should be assumed that in Lithuania it is possible to find schools with the characteristics of learning organization. This is proved by the data analysis in separate schools (Simonaitienė 2001, Appendix 8): the situation among the schools is extremely diversified ranging from schools with developed characteristics of learning organizations to those with almost none. The concrete data (Simonaitienė, 2001, Appendix 8) allows to conclude that the state of a learning organization is not a widely spread phenomenon among Lithuanian schools.

The analysis of empirical and theoretical works as well as the meta analysis enable to draw the following conclusions:

1. A learning organization is a social system that involves individuals' learning, team learning and organizational learning. A special emphasis in this system has to be laid on organizational learning as the most complicated quality that enables the continuous change of organizational understanding.
2. The research in one of the most successful enterprises in Lithuania (a pre–accession country) based on employees' opinions revealed the presensce of most of the learning organization characteristics in their enterprise.
3. The teachers in some Lithuanian schools also claim the existence of particular characteristics of a learning organization, however, the expression in different schools is uneven. Nevertheless, it could be claimed that a learning organization (in fact, not a holistic view) is a reality in the pre–accession country. The limitations of carried research do not enable neither to confirm, nor to deny the assumptions made by Western authors that business organizations are more keen than schools on becoming the learning organizations. In order to more successfully develop the organizations of

pre–accession countries into the learning organizations, first of all, the emploees' participation and management competence should be fostered in these organizations.

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Workshop

Challenges for Research in Vocational Higher Education

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1. Introduction

The higher education system in Finland has been in transition during the last decade. The dual model of higher education has became the corner stone of the higher education policy. This has led to the foundation of the polytechnics. One of the most debated issues has been the role of research in the polytechnics.

The basic legislation concerning the polytechnics was given in 1995 (255/1995). According to the Governments proposal (HE 319/1994) a polytechnic can within its educational task practice research and development work that supports studies in the polytechnic or services the working life within the area. The research and development work in the polytechnics should not be scientific research, which takes place in the universities, but more practical kind of research, which resembles research practiced in vocational colleges.

Since the middle of 1990s the research and development work in the polytechnics has become one of the essential areas of discussion. The knowledge-intensive working life and its higher competence requirements form the nucleus of the identity of the polytechnics. Vocational higher education needs to be able to participate in the development of working life and its knowledge creation in order to be able to implement its educational task. On the other hand the subject matter taught in the polytechnics needs to based on the competencies and knowledge needed in working life. Research and development work seems to be essential for the legitimisation of the polytechnics institution as well as for the implementation of its educational task.

This has been realised by the polytechnics themselves as well as by the policy makers. Polytechnics are hiring research managers, head teachers become responsible of research and development work, networks of polytechnics researchers are formed and in the proposal for new polytechnics law research and development work will become an object of state financing. Already in 2001 the state directed 30 million FIM (about 5 million €) to the polytechnics for the building of the infrastructure of research and development work.

What will the research in the polytechnics then be like? The polytechnics' research is supposed to be something else than the research in the universities and it needs to be related to the development working life. However, all the researchers in the polytechnics have obtained their education in the universities and they have learned to conduct university-type of research. The research tradition in the vocational colleges has been very weak, and it does not form a basis for research in the polytechnics.

There is an urgent need to start to construct a methodologically sound and practically relevant basis for research in vocational higher education. This paper attempts to support this kind of development of research by combining methodological considerations and case-studies.

The context of the case-studies is Helia School for Vocational Teacher Education in Helsinki, Finland. The school has a research and development strategy that was approved in the spring 2001. The strategy defines basic lines for developing research and development activities. The main point of departure is the relation between learning and working life and pedagogical practices relating studying and developing working life. The main targets of research are the practices of studying and teaching and the aim to construct the knowledge base and develop the practices of vocational education.

The research and development activity was organised around 5 clusters that contain several projects. All the projects are related closely to practicing fields that represent the arenas of elaborating and experimenting in practice. The results from the projects will be disseminated through publications as well as through the Internet. The following figure describes the organisation of the R&D activity.

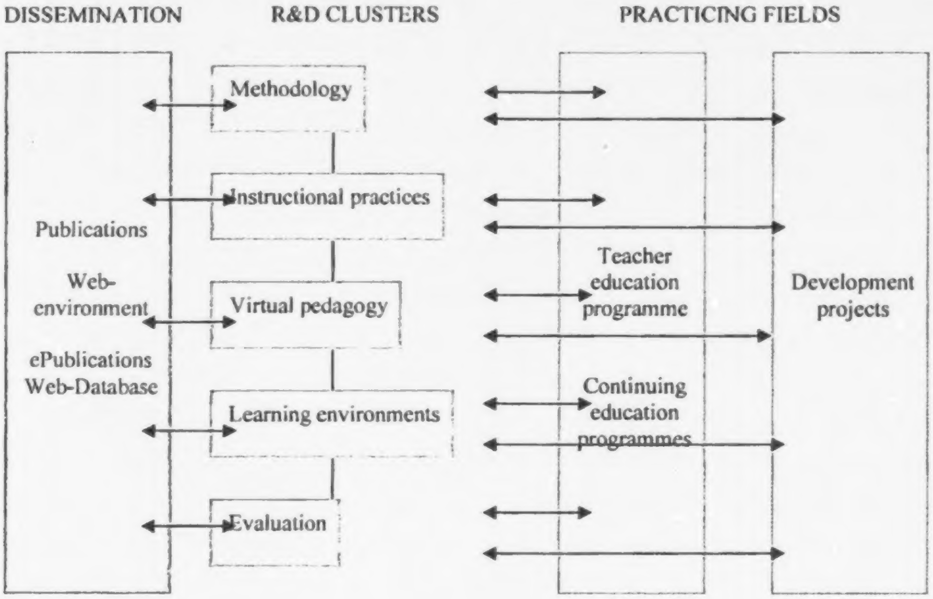

Figure. Research and development activity in Helia School for Vocational Teacher Education

This paper describes four cases representing examples of research and development work in this context. They attempt to open a discussion concerning paradigmatic and methodological issues in research and development practiced in vocational higher education.

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2. Paradigm wanted – search for development-oriented methodology

Hannu Valkama

Shortly

The methodological issue is becoming a crucial question within new systems of higher vocational education if they try to survive and maintain their identity as vocationally oriented and societally advantageous institutions. Sticking to doing "applied research" makes not the difference. A fatal question concerns the methodological paradigm of research at polytechnics. This chapter discusses the tensions in the field and presents a project that was launched for paradigm search: a "münchausening" effort to design a method that would produce itself. The idea of development-oriented research stems from an action research approach with constructive design and is to be enriched to a more full methodology in the process of idea development, empirical anchoring, design scanning and interventions of testing ideas and developing activities.

Institutional tensions

Even though the dual-system seems to hold in German there is a trend towards unified systems of higher education as has been the result in Sweden and Britain (Berdahl 2001). Finnish university-dominated system has been transformed to a dual-model of traditional universities and new polytechnics, but the debate on the status of degrees given by the latter continues.

The non-university sector in higher education was established in Finland along the 1990's. This structural reform was realised mainly by combining existing separate college institutes giving post-secondary education into larger units of higher education (Lampinen 2001).
The experimental legislation gave objectives for the reform and also criteria for experimental units to earn the final status of a polytechnic. Conducting research independently was not mentioned in the criteria but cooperation with universities was noticed as valuable. Later legislation stated that research may be done within polytechnics but it should be focused to developing education and respective work life.

Norwegian example is of interest. A wide survey made in 1998 (Kyvik & Skodvin 2001) showed that research conducted within non-university sector imitated the academic research profile. Although aimed to be applied by nature research work was sentenced to a academic drift. Behind this drift may be seen the unified national appointment and reward systems in Norway but the phenomenon in all might be interpreted as an isomorphic homogenisation tendency.

In Finland the ongoing debate focuses on funding of activities, degree labels and institutional roles in research. In the zero-sum-game of funding the university side feels they are loosing resources to the vocational partners within the field of higher education. The new law of polytechnics that is coming to the parliament this autumn represents an end to the discussion of degrees and their status; it suggests a convergence of higher education institutes and degree labels following the Bolognian road. The suggested legislation also propose funding of polytechnics partly according their research. With establishing the dual system in Finland the rhetoric changed a bit; universities were remembered to actually give research based education, which essentially featured the institution different from that of the new practical-oriented polytechnics. Arguments against research in polytechnics state typically that when engaging in research activities they are changing into universities – and nobody wants fifty universities in a country of five million people.

Not so often have realistic views about the research in polytechnics been discussed in public. How can research capabilities be learned in practical polytechnics when research universities have serious difficulties to teach those to becoming researchers. And what different is to be taught about research work in polytechnics when the teachers' background is mostly in the academic tradition and their possible ongoing own research is to meet the demand to have a higher degree in the very quality assurance by academics. These problems altogether seem to constitute the essential tensions in the polytechnical field today in Finland.

What is needed

A fatal question in sustaining the identity of polytechnics seems to concern research paradigm. Slightly aparting from the discipline-oriented research there has evolved a rich tradition of different kind of "practitioner research" (Jacobson 1998) that is partly still seeking language by which to gain legitimation as scientific activity. It tends, however, to be limited to examining teachers' own work. Kyvik and Skodvin have pointed out that this kind of educational development is not even considered as R&D in OECD's official categories.

What polytechnics need is research that serves also life outside the schools, within local communities and regional development. It is a question of "the third mission" of higher education institutes besides basic education and research (Kinnunen 2001). Within university field this mission, which is also emphasized in the new institutional legislation initiative, has been welcomed as a legitimation of something that has been carried out for some time already, especially by the further education units of universities. But in the polytechnic field the mission is something that characterizes the essence of the whole institution.

Search for methodology

Helia School of vocational teacher education has defined a R&D-strategy to build up connections between schools and work and launched a project to define appropriate methodology for research at polytechnics. The methodology project is searching ways for how research can produce local practical gain so that learning from ideas and implementation of the processes could benefit others, too. The preliminary idea about the method to be tested and developed braces against action research approach with constructive design (Kalleberg 1995), where the key challenges are creative imagination with feasible and desirable constructions as outcomes. Implementation of the project itself is outlined along the same methodological idea.

The methodology project has proceeded from the preliminary idea development (Valkama 2001) to empirical anchoring (Valkama 2002) and is scanning possible designs that may contribute in enriching the idea to a more general and flexible methodology. The project also includes practical interventions at polytechnics to test the ideas and to develop research activities. Here are the steps of the project so far presented briefly.

The methodology project

The original idea of suitable methodologics within polytechnics is grounded into the Finnish tradition of academic empirical research. The development shows layers of methodological trends and a situation, where earlier even contradictory paradigmatic ideas have found peaceful coexistence as recepies of finding truth for everybody to choose. The methodological world is an unquestionable store of quantitative or qualitative, or action research-like courses and handbooks from where one can fetch a ritual to apply. The situation was clearly to be seen when analyzing reports of development efforts of the teacher students at Helia, which actually was a central trigger to launching the methodology project. But also wider studies tell that the very applying of recepies is not simple. Students in universities have felt that methods are the most difficult to learn and deal with when doing the final master piece that shows ability to handle with science (Hakala 1996).

Trying to get a bit more systematic touch of what the situation was with students and their studies at polytechnics, two samples of bachelor thesis reports were analyzed (Valkama 2002). Main findings were

* not surprisingly, any critically oriented research designs were not found

* most of the studies were "constative", mainly interested in portraying how things are

* the methodological profile was somewhat confused with a trend of ritualism

* perhaps interestingly, more of the social and health care studies than those in business/administration were carried out through the whole process ending at some testing of ideas and even applying them

* in spite of the overall picture, there were developmentally oriented studies and evidently more of such outside the samples in which the reports that were labelled as "secret" didn't include.

In anchoring of the idea about needed methodological approach in the practices at polytechnics the seeds of developmental orientation found are convincing enough to proceed and examine further the field of existing methodological innovations. The task of scanning possible solutions is quite wide, but at first it was, of course, wise to look around and wonder what colleagues are doing. At Helia School of Vocational Teacher Education the R&D-clusters consist of approaches that differ a lot on the operational level. For main part of them there are still some more general methodological commitments that can be traced as follows:

* methodology of evaluation research with an emphasis of development-oriented evaluation aiming at transformational learning

* methodological approach following the action research tradition but with a special emphasis in activity theory or methodology of "developmental work research"

* more practical approach benefiting from benchmarking and sharing the ideas and experiences of networks of developing groups

To illustrate the approaches as development-oriented research they can be examined briefly against the cornerstones of the evolving paradigm, how idea development, anchoring of ideas, scanning of possible solutions and testing feasibility are realized. The idea development by nature differs among approaches. Preliminary ideas that more or less represent directions of solutions to possible problems are either generated spontaneously or developed by analyzing the present situation. The evaluation approach has no fixed standards against which to evaluate things. It leans more on participants' own views and feelings about the situation, whereas the situation is seen as objective tensions in the activity system by the developmental work research approach in which the analysis of the history that has led to it is emphasized. In operational level history might be somewhat ignored and finding a theoretical concept or idea with generative power stressed instead. The more practical approach which could also be labelled "benchlearning" (Karlöf 2001) may be more improvement-oriented and seeks new ideas from outside by scanning better, if not best, practices.

If the scanning of ideas or possible solutions differs among approaches, so does also the anchoring. In the evaluation approach ideas are anchored in problems experienced, whereas the developmental work research finds the solutions as inevitable transformations of objective and problem experiencing systems. Improvement seeking benchlearning has to deal especially with feasibility, to analyse how the ideas work as solutions in the very context. This may be realized by critical elaboration of ideas or in a continuous process of implementation and evaluation by the developing groups. And these procedures may be seen as including of testing the idea, too.

The separation of evaluation phase, idea development and its implementation is not the purpose in evaluation approach, but realism. By involving the participants in evaluation activity the solutions and their implementation come closer and the process has the testing of ideas build in it. The developmental work research stresses the testing phase and sees it clearly as applying and experimenting the jointly produced model of new activity. The approach also notices the new possible problems in environment activities that applying solutions in one system produces. Within other approaches it is perhaps more usual to ensure that solutions do not turn to be or produce serious new problems; and the means of achieving this might be going through the critical cornerstones in working for development.

Finally

The original ideal of the development-oriented methodology consisted of aspiration after economical conducts aparting from methodological ritualism. Anchoring of ideas was to guide idea development from not solving other problems than the ones urging solutions. The main purpose of scanning was to derive benefit from inventions or theorizing elsewhere and to prevent from wasting too much energy to invent something that already exists. Testing was seen necessary for modification of solutions to function within the context.

So far there has appeared nothing that would refer these ideals and cornerstones to be false. But what has appeared is that in the research and development field there exists a variety of means to get to the ends. To continue examining and elaborating approaches also "outside" and on the operational level and engaging with practical efforts of development seems to be the way this project might also get to its end – if there is one.

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3. Integrating learning and the study of change at work: the alternative enterprise method

Seppo Peisa

Introduction – starting points for developing "the alternative enterprise method"

In 90's there awakened in Finnish vocational institutes, specially in commercial colleges, an interest in the models of practice enterprises developed in Central Europe, mainly Germany and Austria. The interest based on one hand on the aims to bring school learning closer to work practices and on the other hand on the good results reported by the guest lectures and research reports. (Jamieson et.al 1988, Tramm, 1996). Elaborating in some commercial colleges and Helsinki School of Vocational Teacher Education (HSVTE) produced a new kind of model of practice enterprise, which is named " the partner based practice enterprise". Within this model the starting point of studies is to analyse and model the activity system of a real enterprise (the partner firm) and to construct the simulation representing the partner firm. Student's learning activities concern the tasks of the simulation. During the learning process the students and teachers evaluate the solutions that have been made and the quality of learning, too.

In addition to good results we could note clearly some major weaknesses, too. It proved, for example, that students analyses of activity systems of the partner firm were superficial and the simulations were too simplified , the tasks students have to carry out represented poorly work practices and didn't include the typical dynamics of realism. In addition, during experiments we noticed problems in organizing and arranging the studies in schools, too (Peisa, 1996, Miettinen, R. & Isokangas & Peisa, 1997)

The collaborative project with the Satakunta Polytechnics and HSVTE started at the end of 90's. The aim of this project was to elaborate the model of a new kind of study, which will cross the problems of "partner based enterprise", the boundary between polytechnics studies and working life and stimulate a new kind of learning, that responds to the changing needs of working life. From the point of view of HSVTE the aim to elaborate and analyse the new study model was to obtain practical and concrete experiences for the teacher education program and at the same time to elaborate the knowledge base of vocational teaching and learning in general (Peisa & Miettinen,R. 1999).
The project of "the alternative enterprise" will be next described more concretely and detailed.

A short description of study project

The new kind of study project was realized in Rauma, Finland during the school year 1997-1998 as a collaborative project between the Unit of Technology and the Unit of Business and Administration of Satakunta Polytechnic, and a partner firm, Laimu Inc., a manufacturer of tractor cabins. A student collective drew up a business plan for an alternative enterprise of Laimu and called it RaumaTrack. Four teams of students were formed to draw plans for the following functions of the firm: production, logistics, financing and accounting, and marketing. The business plans produced by the student groups can be regarded as interpretations of the main problems and challenges of Laimu's core business functions and as suggestions to solve them.

The basic features of the new kind of studying are presented in the next figure. The figure characterizes the object of learning and the social organization of the project work.

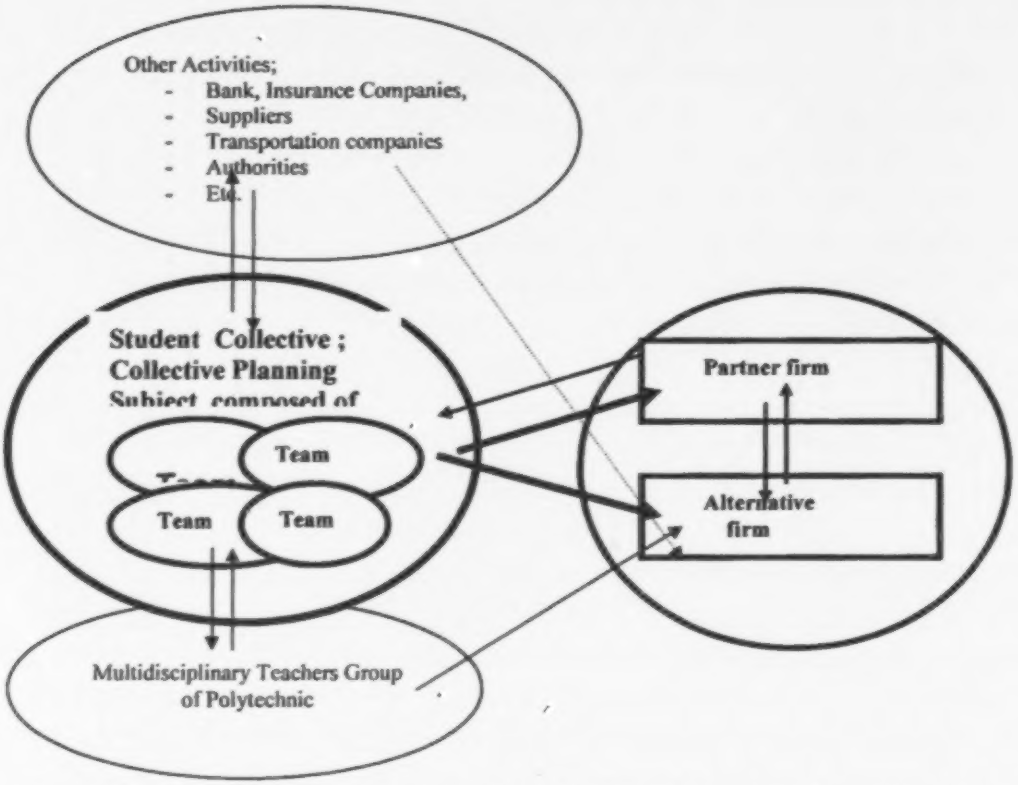

Figure. The object and the social organization of learning in the alternative enterprise study project

The object of learning can be defined in two complementary ways. First, it is comprised of the conditions, means and actions prerequisite for the foundation of a business firm. The students make, during the study project, all the necessary analyses, calculations, plans and documentation pertaining to the foundation of the firm. Secondly, the object comprises the developmental possibilities and challenges of an existing commercial firm, the partner firm. This zone of development of the partner firm is made visible by three steps in the project. First, the student teams study the basic functions (production, marketing, finance, ect.) of the partner firm in its business environment. Second, they form a conception of what is problematic and deserves to be reorganized in the firm. Third, they make a business plan for an alternative firm. That plan offers solutions to the problems they have been able to recognize in the functions of the partner firm in the form of better ways to organize the firm's activities.

Thus, the object of learning is the developmental possibilities and needs of an actual firm, expressed in the form of a business plan of an alternative firm. Since the students have no direct accountability to the partner firm, they can freely develop alternative solutions in their plan. The suggestions of the plan are submitted to discussion with the firm, which is free to choose whether to ignore, implement, or develop them further. This object of learning can be characterized as a zone of proximal development of the partner firm, suggested by the student collective.

The concept of the zone of proximal development was first coined by Lev Vygotsky to define the zone, where teaching (the resources of a more experienced representative of culture) and the individual developmental potential of a child meet. Vygotsky defined it as a distance between the actual developmental level of the child and the level of potential development "determined through problem solving under adult guidance or in collaboration with more capable peers" (Vygotsky 1978, 86). Yrjö Engeström extended the concept to collective activity systems. His definition is the following (1987, 174):"The distance between the present everyday actions of the individuals and the historically new form of the societal activity that can be generated as a solution to the double bind potentially embedded in everyday actions."

The network depicted in the preceding figure is a social arrangement that can help make the zone of proximal development visible in a firm. The teachers of polytechnics are committed to following the developments in business studies that produce new models and means for business activity. They also detect the markets of new business-activity instruments, such as computing programs, simulation systems and different kinds of business analysis models. In the case if the partner firms are traditional, small and medium-sized firms, the natural role of the polytechnics is a transmitter of developing cultural resources that can help these firms articulate their developmental possibilities. The alternative enterprise project is a social instrument of using these resources to construct the zone of proximal development for the partner firm. On the other hand, for the students and teachers, it is a way to study and analyze the change and development in working life. In designing an alternative enterprise, the tension between the old and new is at stake.

The social organization of the project, displayed in the preceding figure, can be characterized as a network of learning, in which the four basic participants each have a different interest, degree of involvement and contribution to the process (Miettinen 1999). It can be called a network of learning, as the participants contribute to the outcome (the business plan of the alternative enterprise) and they also learn themselves in the process.

The teachers function as the planners and initiators of the process, informants and sources of knowledge for the students and also evaluators of the solutions. They define the starting rules and frame for the project. Soon after the start-off of the project, students will take the initiative and become the main subject in the process. The student collective is composed of the board of directors of the alternative enterprise and student teams specialized in the analysis of different business functions, such as finance, production, logistics and marketing. The student collective independently organizes the work of the project, produces the analyses and draws the alternative business plan. The representatives of the firm exercise three functions in the collaboration. First, they provide information and access to the firm's activities for the student groups' analysis. Second, they evaluate the quality of the solutions proposed by the students. Third, they consider the usefulness of the latter for themselves and proceed to study further or implement the suggestions. It is the last option that excites and highly motivates the students and forces them to be realistic and serious in their work.

In the project, the students are requested to contact and negotiate with all the authorities and institutions that have a role in the foundation of the firm. For example, in the case of financing, the collaboration often involves negotiations with the representatives of a bank, the documents being prepared by the students. In this collaboration, the students study the conventions and rules governing the foundation of a firm, acquire the necessary background information on different aspects of their business plan. These weighty, albeit more peripherally involved participants of the process, contribute, however, in an essential way to the students' construction of the business plan of the alternative firm.

……

During the process of planning, each of the student teams made numerous analyses and plans prerequisite for the foundation of the enterprise. The final business plan is composed of these analyses and plans. Together they constitute about 25 documents (plans with sets of calculations), with some 200 hundred pages of text. The plan itself was divided into six parts: 1) the business idea and strategy for the alternative enterprise, RaumaTrack, 2) the plans for marketing, 3) the plan for production, 4) the plan for purchases, storage and transportation, 5) the plan for financing and accounting, (budgets, plans for book keeping), and finally, 6) the plans for the operative actions of the alternative firm during the first year. The teams bear the responsibility for the subplans, but these have strong interdependency with each other. For instance, in the financial negotiations, the production and marketing plans are carefully scrutinized. The students learn, therefore, the value of distributed expertise in the attempts to achieve a shared product.

The business plan was not only a vision of a new activity or a collection of plans. The four subplans of the actual business plan were based on the analyses of the way the partner firm organized these functions. The plans of the alternative firm include suggestions for organizing these functions in a better or a more advanced way. They constitute, therefore, also an attempt to formulate the zone of proximal development (ZPD) for the partner firm. After having done their analyses and plans, the students arrived at fairly clear opinions of the "bottlenecks" or weaknesses of the function of the partner firm.

This articulation also elucidates the developmental challenges of a traditional, medium sized enterprise in Finland, the tension between the theory studied in the polytechnics and the reality of working life. The articulation of the ZPD of the partner firm helps the students evaluate the terrain of their own professional possibilities and interests.

How the process and outcomes of study project were analysed

The student teams and the student group visited the partner firm 21 times. The main meetings with the representatives of the partner focused to the solution the teams made. The solutions were analysed and assessed in a collaborative discussion with the experts of the partner.

The analyses of the study project based mainly on four kinds of materials;

a) The reports on the solutions the student teams made for the business plan
b) The team diaries and the field reports the student teams made concerning the team's work sessions and meetings with the representatives of the partner and other co-workers
c) During the study process the students, the teachers and the company representatives were interviewed by the researcher
d) Key planning meetings of the student groups were videotaped, and the student group's visits to the Laimu plant were observed and audiotaped by the researcher

Analyses of this material gave more detailed knowledge about successfulness of teams solutions and about the ways the solutions have been made.

During the school year 1997-1998 the student teams and the teacher group met every Wednesday in the week session for analysing the solutions of the teams had made and for composing and planning new tasks the teems were to carry on in the next weeks. The researcher of HSVTE participated very often (29 times) in the week sessions to discuss the results of analyses, too. It can be stated in general that the collaborative analyses of the solutions and study processes were the main tool to support the student group' s work.

Conclusions

The main problem of the study project was: how the content and methods of studying and learning can be connected to the rapid change in working life. From a practical point of wiev the aim was to elaborate and test a new kind of a way to study polytechnics studies.

Following conclusions on the base of analyses can be made;

1. The alternative enterprise method supplies novel solutions to this challenge as suggested by the case of alternative firm - RaumaTrack. The students test the knowledge and tools supplied by the courses of the polytechnics in the analysis of the partner firm Laimu's situation and in planning the alternative ways of realizing the firm's functions.
2. Secondly, the basic structure of the project organization and project work itself simulates the practice of firms. The general recommendation for the structure of the organization is, that the organization follow that of the firm: CEO, the Board of Directors and specialized teams corresponding the firm's functions, responsible for different parts of the forthcoming business plans, are formed. The functional directors of the firm are team leaders and representatives in the board of directors. Otherwise, the students are requested to organize the planning work quite independently
3. Thirdly, the students also establish the network relationships necessary for their project with actors outside the school context. This simulates what work is required in the founding and planning of a firm
4. Consequently, and this introduces the significant point, the capacity of maintaining mutually beneficial interaction with partners constitutes the social basis for partner- and network-based studies analyzed in this paper. To create and maintain such relationships is a major challenge for vocational schools and polytechnics. The transition from one project to another constitutes a decisive point of negotiations to assure the continuity of the collaboration. In the case of Laimu, this was not realized. The reason for this discontinuity might sound unexpected. The students took the initiative in studying the partner firm and interacting with its representatives. The leaders of the student teams would have been the most knowledgeable agents to negotiate with the partner firm on the content and requirements of the subsequent projects. Since they left the polytechnics, the teachers were unable and unwilling to reflect and define how the work with the partner firm should be further developed

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4. Space wanted – search for prerequisites for active and independent learning

Liisa Torvinen

In the previous case Seppo Peisa gave an example of research that grows from vocational practice, from concrete contexts. My example deals with an idea which as well had its origin in the concrete contexts of vocational teachers, but which differs from Peisas example by dealing with a non-visible phenomenon.

"The human side of vocational education"

In R&D of polytechnics it is self-evident to put the efforts on vocational and working life's concrete problems. But is this enough: has teaching and learning to do with those only? Polytechnics are educational institutions, thus teaching and learning include also phenomena of people and social or human relations, of " the human side of vocational education". Teaching and learning are not just technical performing. Questions of this area may rise within some concrete-focusing research – as happened in my case.

Teaching includes a lot of leadership and guidance. But what are these? What are these, in particular, if the students are to be active and independent learners who take initiative and responsibility on their learning? The features mentioned seem to be a prevailing ideal in teaching and learning, in vocational education as well. Several arguments for this ideal can be presented, e.g. ones from working life, but not too often do we hear about how students could be contributed to sustaining those qualities.

The concept of Students' Space

From students, those qualities require mental alertness and flexible reactions, and these need space for moving. Here we deal, at least, with human relationships and communication, in instruction also with the nature of teacher interventions. As a mediating element between the teacher and the students I have been cherishing an idea of a kind of mental space, of freedom. Teachers influence the students' experience on this space, perhaps decisively. My concept of Students' Space (Torvinen 1997a) could be determined as an area of mental freedom where students may feel it possible to steer independently their thinking and acting.

Research 1997: preliminary theory

I had a research project on orientation in learning (Torvinen 1997a). It concentrated on teachers' conceptions and practices which were also mirrored against the ones of their students. The empiric for this longitudinal project of three years was gathered from Finnish business colleges and polytechnics, mainly consisting of nine cases of teachers and their students (interviews, class-room observation and written material such as learning tasks). Every now and then in the process I found myself wondering why space-giving instruction seemed to be quite rare in teachers' practices. Though still keeping the focus on orientation, the main research area, I began to look also for signs in the empiric that would tell something more about an invisible phenomenon, about my emerging idea of some mental space in instruction. I named it Students' Space (or is it Student's Space – this is a question!) and in the research report I presented, yet only as a sidepath, my first attempt in theorising this phenomenon and concept. I was also willing to articulate for space being a prerequisite for activity and independence of learners.

Students may look for a place of their own ("Third Place", Kramsch 1993). In a lesson, as a social space, the situational power is mainly owned by teacher, not by the students in the first place and actively (Laine 1999). In my research I recognised some signs about how teachers seemed to create space with modes of instruction such as loose instruction and student-centred ways of working. The modes seemed to promote students' motivation, collaboration and initiative. Yet, in these cases, students sometimes experienced their learning tasks too vague and unclear, and teachers felt uncertain because of loose instruction and unexpected situations.

(Most probably, the space is also influenced by the students' mutual acts. One possibility is that the students initiatively take their space, no question of what the teacher's intention is (Gutierrez & Rymes & Larson 1995).)

Research 2001: sharpening theory

The concept of Students' Space was living in my mind further, and I wanted to work towards theorising and defining it sharper. Every now and then, in my work as a vocational teacher educator, I was discussing the concept with student teachers and also with experienced teachers, and in this way I also got some response of its operationality. In those years, 1997-2001, I gathered various materials which I sensed had something to do with my concept. These came mainly from the student teachers: work papers from their seminars, learning tasks – all of which dealt with their everyday work with the students in polytechnics. When collecting material I did not close my eyes from fictive literature or life experiences in general either.

Some suggestions for prerequisites of Students' Space then developed (Torvinen 2001). The space can be seen as an two-fold area: It is a student's very "own" place, close to him or her, but it is also the student's broader field of activity and allowance. Here teachers can give peace and leave distance to students' own activity. They also might try to learn better the students' scenery. To some students boundaries of the field seem to mean security. In addition, the students' experiences of space are, most probably, influenced by how they interprete emotions expressed by teachers, by nature of teacher interventions, and trust they show on students.

Double-effect method

My method was a mixture of grounded theory and of testing a conceptual idea in practice. I was not that much for grounding after grounding in order to end to something pure and refined. I was rather after figuring out whether the concept is beneficial in teachers' practices: How do they receive the concept, whether they see it relevant in their practices and what the relevance could be. I simply was testing the concept in (often informal) discussions within teacher education: anchoring my thoughts in the field of practice. When doing that I could gather new points of view, which helped to re-define the concept sharper. In fact, this continuing dialogue between the development of the concept and teachers' real work practices became a method, and a double-effect method: re-conceptualisation of the phenomenon and helping teachers in developing their leadership and guidance practices.

The response has been quite encouraging what comes to the question whether the concept of Students' Space is operational within the work of a vocational teacher: The concept seems to help teachers seem to get a kind of insight: "This is something that I always knew, but I never had a name for it. Now, with the name it is easier to take it into consideration in my thinking and acting." The teachers have told, for example, about experiences when communicating (e.g., talking versus keeping quiet), about defining boundaries of how largely to instruct learning tasks, about seeing this as a question of working life's leadership etc. In short, the concept seems to be a help for reflection, thus for becoming more conscious of work practices, and, particularly, for being sensitive to the point of view of their students and their learning.

And now?

So far my interest has been more in theorising the phenomenon than discovering systematically areas of the concept's operationalisation. Yet, the concept's idea originates from vocational teachers' practices and that is where it also should belong. Thus, the next step seems to take place in the fields of practising. In virtual learning, in problem-based-learning etc. I can see such connections to space as self-directedness in learning, the role of the tutor, and the qualities and instruction of learning tasks, and also development -oriented evaluation.

When suggesting the concept of Students' Space as one of the prerequisites to enhance students' independence, initiative and responsibility in their learning activity I am very aware that is a question of self-reflection for a teacher. At the end it is a question of human respect.

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5. Constructing models for the transformation of teaching

Antti Kauppi

Introduction

The transformation of teaching has proved to be a difficult task to tackle. The routinised practices seem to both resist and require changing. Research on teaching and learning has not been relevant enough to support the development of practices. The models used in practice seem to have a narrow view on the problems and issues to be developed. This chapter synthesises methodological considerations related to a longer research process based on case-studies from development projects and their theoretical elaboration. The aim is to raise methodological issues into the discussion concerning research and development in vocational higher education.

Need for practical research with theoretical relevance

The educational researchers are not totally happy with their accomplishments to understand and change educational practices. The president of European Association for Research on Learning and Instruction (EARLI) Erno Lehtinen (2001) took up in his address the issue of practical relevance of research. He admitted that there is distrust between researchers and practitioners. On the one hand, there are questions concerning the nature of research. There are relatively few attempts to build up well-organised cumulative knowledge and new theories often try to challenge the entire old tradition. On the other hand, the visible effects of learning research are not always positive and invisible effects take place very slowly. It is easier for the researchers to turn to developing new terminology and blaming teachers. He also criticised the building of theories as ideologies basing on the overgeneralization of ideas. He proposed an alternative approach for coordinated combination of different theoretical approaches interrelating theories and research with other disciplines. He stressed especially the need for combinations of multi-level theories connected to practice.

In addition, when we look at the models practitioners use in their everyday life, they seldom seem to be developed by academics. For example Lukka (2001) argues that in business studies most of the important constructions – such as the return on investment formula, the idea of the activity-based costing systems, or balanced scorecard – have become developed in practice. I myself have analysed the models of adult and continuing education planning, and also have realised that the models used were almost totally developed in practice, although they were sometimes published by academics (Kauppi 1989).

The models used in practice can also be criticised by having a narrow view on the issues modelled. For example Eraut (2001, 1) observes that the knowledge management perspective suffers from a dangerously inadequate view of knowledge; and the learning organisation perspective from a dangerously inadequate view of learning. The question of what it means for a group or an organisation (rather than an individual) to know or to learn has not been properly tackled in either perspective. Neither the critical connection between knowledge retrieval and knowledge use or between learning and action has been fully considered. These both perspectives are at the moment very popular in many development projects in schools as well as in other organisations. The models and perspectives discussed in practice may have serious and unknown limitations as well as many unintended consequences, when they are used.

For research to improve teaching practice, the limitations of conventional research are not only practical, but also philosophical. Conventional research is a search for uniform principles that govern a particular phenomenon. These uniform principles are expressed in theories, which are assumed to be context-free, thus generalisable across contexts. However, theoretical knowledge is rarely complete, nor is knowledge of particular contexts where it is to be applied. The challenges for research in vocational higher education include the overcoming of the gap between practice and theory.

Teaching practice as the object of research and development

Researchers who have studied school reforms (e.g. Cuban 1984, Goodlad 1984, Sarason 1990, 1996, Tyack & Tobin 1994) have realized this phenomenon, and some have even made a conclusion that it is impossible to change teaching practices – these react to every demand for change hesitantly. Similar experiences can be traced also to school reforms in Finland in the 1970s and 1980s (e.g. Miettinen 1990). Despite of the seemingly irresistible conclusions concerning the unchanging nature of teaching, the teachers themselves do observe changes in their work. They do not teach the same way they taught ten years ago.

Teachers act always in historically evolving institutionalised and organized contexts that represent the social order and are the units of culture presented to teachers. Teachers' everyday activities have routinised over time in such an amount that there isn't necessarily any more time or need to think, what they are doing, and why. The routinised models of action have proved their practicality and workability in practice, and they therefore form the nucleus of teaching. The routines have organized the rhythm of the work.

However, the routinised models of action are not static in a sense that they wouldn't change. They do change. When the contextual antecedents and requirements change, teachers' models of thought and action have to change as well. The strategies of change are built into the culture of an educational institution. It can be argued that teachers' learning strategies are embedded in the institutions' learning system, which is concerned with the changing of the social practices in the institution.

The development of teaching includes a requirement that teachers start to do new things, or at least that they start to do old things in a new way. Only this way routines can be broken. In addition, teachers need to start to revise their thought models. The doing of things in a new way is related to thinking about things in a new way. At the same time teachers transform their practices they reconstruct themselves through narratives, discourses and activities.

In order to support and facilitate the development of teaching as well as to do research on it, teaching practices need to be analysed, elaborated and experimented with.

Research process: From practice to theory and back

The focus of this research process has been on constructing theoretical models that structure our understanding of transforming teaching practices. The construction of theoretical models has taken place through a discourse between practice and theory.

The basis of the research lies in the development projects that the researcher has participated in as a researcher and a consultant. The projects have not only been practical experiments in transforming teaching but they have also served as a test bench for theoretical elaborations.

During the research process the researcher has participated in the practical development work, collected data from the cases, analysed the data, discussed with the practitioners and other interest groups, and written reports, books, articles and papers, as well as presented the findings and conclusions for many different both scientific and practical audiences. The researcher has not been an outsider in the process. On the contrary, this research, as much as it has been theoretical elaboration of the transformation of teaching practices, has been a description of a researcher's personal journey towards understanding why and when teaching practices change or don't change and how to support and facilitate the change.

Case-studies as raw material

The case-studies published and presented before have been used as a raw material for the theoretical elaboration. They are historical documents as they are, and they show how the researcher saw the phenomenon in a certain moment of time. The cases were different from each other considering the context, content, process, and methods used. However, they were similar in the sense that all of them focused on the transformation of teaching practices and were based on the idea of "teachers as developers of their own work". The aim has been to rise above the differences between the cases in order to make higher-level theoretical elaborations that can help in understanding issues relating to the transformation of teaching practices.

This research did not concentrate on the case studies as such, but took them as given, and tried to elaborate their value for the development of theoretical models. Each one of the case studies has been a large research and development project in itself, and it would have been impossible to go deeper into the case studies within the scope of this research. It would also not have served the purpose of this research. The validity of the cases and the theoretical developments has been tested through discussing them with both practitioners and researchers as well as publishing them for the evaluation for a wider audience. The functionality of the cases depended upon their ability to focus on questions that were useful for finding practical issues and constructing theoretical models.

Models as tools to construct and transform teaching practices

The cases and theoretical considerations had a constructive character in the sense that the theoretical models produced during the research process were novel constructions. The functionality of the constructions was tested through the practical experiments in the development projects.

A model was taken to be a construction in which we organise symbols of our experience or of our thought in such a way that we effect a systematic representation of this experience or thought, as a means of understanding it, or of explaining it to others. However, models are also representations to ourselves of what we do, of what we want, and of what we hope for. The model is not, therefore, simply a reflection or a copy of some state of affairs, but beyond this, a putative mode of action, a representation of prospective practice, or of acquired modes of action. (Wartofsky 1979, xv).

The models constructed are representations of both 'external world' and knowing subject. Therefore they offer an opportunity for the critique of presuppositions and frames of reference as well as for reflective processes of meaning making. The research is seen to be embedded in the development projects as well as the researchers own processes of thought and action, and is constitutive of these activities. Reflectivity was understood here not merely as self-consciousness but as the monitored character of the ongoing flow of social life (e.g. Giddens 1984, 3).

Models offered also opportunities for knowledge creation. By constructing a model it is possible to create something that differs profoundly from anything which existed before. In this sense novel constructions bring forth, by definition, new reality. By relating models to practices it is possible to design and produce the new practices.

Conclusions

The research process shows that it is possible to construct a discourse between practice and theory. The practical cases can serve as raw material for theoretical elaborations. Even though each unique case represents its specific context, the cases can be used to construct models that may have larger applicability. Models may serve as tools for reflection, knowledge creation and transformation of teaching practices.

When research in vocational higher education is considered, there is also a need for more theoretically oriented research that produces the tools to understand and develop practices. From this perspective Kurt Lewin's famous statement – there is nothing as practical as a good theory – seems to a good starting point.

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Competence and learning in late career. European perspectives on the management of motivation

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Introduction

Over the next decades the predicted ageing of the labour force will be a major challenge for policy makers and companies. Between 1995 and 2030 the average proportion of workers aged from 45 to 59 years may rise from 27 to 33 per cent in the 15 EU-countries (OECD Employment Outlook, 1998, pp. 123-126; Tikkanen, Lahn, Lyng, Ward & Whitnall, 2001, pp. 4). In addition the level of education among older workers will rise rapidly, and their skills should take on increasing relevance in a knowledge-intensive economy.

The debate on late career has raged backwards and forwards during the last twenty-five years. First, from labour market initiatives that encouraged early retirement to a policy of "detainment" in the 1990s, when their burdening effects on pension schemes came to the fore. Measures were taken in several European countries to "combat age barriers" in working life (Walker, 2000) and to keep older people on the job and out of the social security budgets. The last five years a shortage of expertise in many sectors have forced actors in the labour market to promote a vision of late career as a productive phase. I have called this focus a "policy of competence development". Tikkanen, Valkevaara & Lunde (1996) suggest that the field of HRM has been moving towards a more positive view of older workers during the last 25 years. In general however these issues have not attracted much attention in recent reviews of HRD and HRM (Brunstein, 1995; Brewster & Holt Larsen, 2000).

This mismatch between a growing political interest in the field and low prestige among researchers served as a motivating background for the 4th Framework project "Working life changes and the training of older workers" (WORKTOW) with partners in the UK, Finland and Norway – and associated activities in the Netherlands, Germany, Switzerland, Sweden and Italy (Lahn, Thijssen, Tikkanen & van der Heijden, 1998). Totally 27 small-and-medium sized companies participated in the empirical part of the study that included in-depth interviews, documentary analysis, questionnaire data (378 employees and 37 employers) and work shop observations. The major themes were related to the participation of older workers in training and informal learning activities, and to social and institutional factors that may influence this "community of learners" (Tikkanen, Lahn, Lyng, Ward & Whitnall, 2001). An important deliverable from the project was a multidisciplinary literature review combined with theoretical explorations that has helped me frame the following presentation. Needless to say I cannot do full justice to the rich empirical material from the project, and my arguments here will have to be substantiated by somewhat scattered evidence from the field. These data have been processed and analysed by combining systematic interpretations of casuistic data and theoretical elaborations of key relationships (Alvesson & Skiöldberg, 1994).

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In my presentation I will first review research on age differences in job performance and learning abilities. There is growing evidence against a unidimensional understanding of late career – or the period from 55 years to 70 – as a declining one. Instead professional expertise may undergo qualitative transformations in the course of time, and different skills interact with the historical requirements of the "new work order" (Gee, Hull & Lankshear, 1996). One of the paradoxes in modern working life is the rising problem of early exit in many European countries on one hand and the potential attractiveness of senior competence on the other. The still prevailing negative attitudes towards older workers represent a mediating factor. Findings from the WORKTOW-project and other studies suggest however that those perceptions vary along several dimensions and within different contexts. Stereotypes about aging and learning abilities are deep-seated and may have a detrimental influence on the readiness of senior employees to participate in training or to commit themselves to work life transformations. Thus issues of self-perception, motivation for change and career development are raised. My approach will be to question the literature on "boundaryless career" in professional life as it relates to senior employees. Whereas models of cognitive ageing are highlighting the limits of growth in late career, the prescriptive message in newer career theory is a rather optimistic one. It tends to replace biological universalism with socio-genetic generalisations. In concluding this article I will propose some guidelines for a mediating framework.

Research on cognitive ageing and job performance.

Reviews of ageing and work usually start with a discussion on differences in job performance and mental abilities (Davies, Matthews & Wong, 1991; Forteza & Prieto, 1994; Cremer & Snel, 1994). I will not break radically with this tradition, but more space is devoted to questions of learning competence and less to levels of operative effectiveness. Furthermore my intention is not to go deeply into the vast literature on cognitive ageing, and for well-founded overviews I will refer to Salthouse (1991), Schaie (1996), Park (1994).

One of the general characteristics of this field of research is the discrepancy between laboratory studies finding evidence of decrements in mental functioning from the 60ties and a vast number of studies showing no age-related downwards trend in work abilities and performance (Warr, 1994). In addition multidimensional perspectives are gaining ground, for example Warr (ibid.) divides work performance into physical ability, adaptability and general work effectiveness, and a finer classification could easily be made (Lahn, 1999). Whereas an age-related decrement in sensory-motoric speed is seen in many occupations, expertise may counteract such processes (deZwart, Frings-Dresen, & van Dijk, 1998; Salthouse, 1996). The same goes for cognitive abilities, but contemporary developmental studies are careful to define key characteristics of tasks like simple/complex, low/high time pressure and concrete/abstract (Salthouse, 1996; Schaie, 1996; Warr, 1998).

According to a vast collection of studies on cognitive ageing older people are less effective than younger ones in performing tasks involving complex information-processing – especially under time pressure (Salthouse, 1996). In general there seem to be only a modest decline until early 60s, but adults in late career may experience specific problems with situations that activate their "working memory" (Craik & Jacoby, 1996) or with so-called "dual task"-activities where two sets of mental operations are performed at the same time (Kramer & Larish, 1996). Several explanations are given for these differences - ranging from deficits in processing capacity, lowering of speed in information-processing (Salthouse et al., 1996; Schaie, 1996), weakened inhibition of irrelevant information (Hasher et al., 1991). Those taking a knowledge-based perspective would predict age-related "cognitive slowing" when the amount of stored experience is large and implicitly learned in contrast to the acquisition of a well-defined and structured material (Cherry & Stadler, 1995). Some researchers argue that we are mainly speaking of cognitive style – reflecting a more careful way of performing in new environments (Warr, 1994). Also the compensating or transformative role of work experiences is receiving more attention in contemporary research, for example studies of professional contexts where complex decision making under time pressure is expected, like air-traffic controllers (Heier et al, 1997), show no evidence of age-related decline in job-performance.

Biological explanations of age-differences in problem solving have been challenged on methodological grounds. For example it is shown that birth cohort is a far better predictor of basic mental functioning than age (Schaie, 1996), that environmental cueing and interventional programs are boosting not only skilled performance, but also underlying cognitive capacities among older adults (Baltes, 1993), and that the cultural context influences the configuration of deep biological structures (Lyng, 1996). Highly correlated scores on task-performance in school-like settings are not generalized to real life domains (Park, 1994). Domain-specific models of human expertise should be extended to include studies of different individual occupational trajectories. Several studies have found higher intra- and interindividual variability on mental abilities in late adulthood (up to around 80, Morse, 1993) compared to younger subjects. In other words people develop different skills at different points in life, and at the same time people become more and more different. These conclusions suggest that a life-course perspective on HRD should be differential across domains of expertise, individual biographies and age groups.

Learning abilities in late career

Research on learning abilities in a life span perspective draws heavily on the conceptual and methodological tradition of information processing theory and cognitive psychology, and my previous comments on this framework also apply to this section. Often a distinction is made between learning new skills within the expert domain of experienced professionals and learning in a radically different field. The content of learning is also relevant to this discussion. Most studies have focused on learning of technical-instrumental (cognitive) skills, whereas the acquisition of social competence is less well understood.

Laboratory studies that compare learning outcomes for younger and older subjects conclude that the former are the most productive (same outcome in less time), see Kausler (1994), Warr (1994). The differences are largest in the initial learning of new material (Warr, 1998), which is consistent with research pointing to a decline in intentional learning and metacognitive processing (awareness of problem solving strategies) with age. In analysing the underlying mechanisms attention is directed towards differences in relevant practice, processing speed and weakened inhibition. Also in learning to perform real life tasks, for example to use computers (Baldi, 1997; Birdi et al., 1997), the oldest group was less successful - especially when they are put under time pressure. Like many observations about learning and old age these could be interpreted in a more contextualistic direction. For example the problem of ageing learners to acquire "abstract" or school-like skills may be a function of low formal training and a cohort-effect. As pointed out by Warr (1998) younger and older workers are often given the same amount of training in the use of ICT which place the later in a disadvantageous position, since they lack basic skills. In professional contexts where continuous learning is essential to productive career, for example among scientists (Streufert, Pogash & Piaseck, 1990) and clinical psychologists (Smith, Staudinger & Baltes, 1994), there is evidence of deepened expertise in late career

Instructional guidelines for adult teaching very often find support in experimental research on age-differences in learning abilities. For example new material should be presented at a slow rate and in small chunks with frequent pauses for note taking and discussion since the information processing capacity is said to be reduced with increasing age (Fry, 1992; Fisk & Rogers, 1997). The assumption that older adults may experience retrieval deficiencies when relating new information to their existing "knowledge base", is said to account for the improvements obtained when they are exposed to an environmentally rich learning situation (Bäckman, 1989; Craik & Jennings, 1992).). Let me briefly quote a couple of instructional guidelines for effective training of older people taken from different texts.

- Overcome apprehension, use relevant tasks, give sufficient feedback, build on existing knowledge, organise material to facilitate recall, accommodate to individual needs (Sterns & Doverspike, 1989; Greller & Simpson, 1999).

- Stimulate active processing, give systematic feedback, use recognisable concepts, provide direct application, create friendly atmosphere and a well-structured sequence in the material to be learned (van der Kamp, 1992)

These principles have an intuitive appeal and are rather non-controversial. However one may ask whether they do not apply equally well to old as to young learners. From a different perspective it would be relevant to question the general validity of such guidelines since they seem closely associated with formal training programmes. However, the observations from the WORKTOW-project suggest that "good" learning environments for older workers share some characteristics with those listed above (Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001).

- Management and colleagues should clearly stand behind a learning agenda (Arthur, DeFillippi & Jones, 2001) for older "apprentices". The later have to be convinced that they are counted as learners, and such a message has to be followed up by positive feedback to alleviate initial fear and defensiveness. Our data suggest that this strategy is especially important for employees with low formal education. Instead of motivating for participation, it seems necessary to think participation in order to motivate (see also Warr, 1998).

- Study circles at the work place enable experienced workers to bridge their practical skills and scholastic teaching. As demonstrated in a couple of WORKTOW-cases group-based instructional methods may also provide hesitant participants with rich and supportive feedback.

- For employees with long experience in routine work the design of a guided curriculum (Billett, 2001) should be considered. Their roles as self-directed learners have to be learned in small, but systematic steps.

- Empowerment strategies, job-enrichment and cultivation of learning environments should take into account dominant work values for senior employees, for example the need to be independent in their work and loyalties to traditional power structures in the companies.

In their model of "career capital" and its accumulation DeFillipi & Arthur (1996) distinguish between three ways of knowing. These are "knowing-why" reflecting individual values, motivations and identities, "knowing-how" understood as a repertoire of skills and expertise, and "knowing-whom" referring to the position of workers in internal and external networks. For employees in their late career the resources associated with the first type have an ambivalent status since traditional identities and values very often do not include visions of this group as learners. On the other hand WORKTOW-observations and my discussion above indicate that the accumulation of "knowing-why" is the most challenging task for an age-aware HRD. We may have to overvalue the abilities of older workers to expand their technical (knowing-how) and social skills (knowing-whom) when we want to change their motivation for learning. In this argument age-related stereotypes play an important role as I will discuss in the next section.

Attitudes towards the learning abilities of older workers and motivation to learn.

If I compare my summary of research on age-differences in work and learning abilities with every day perceptions, some tentative generalizations could be made on the base of WORKTOW-data and other sources.

- *General positive attitudes towards the competence of older workers* are reported in the WORKTOW-data (Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001). In this respect no differences were found between managers and employees. When we look more closely at the qualitative assessments of long work experience, the following benefits were mentioned: Social and communicational skills, broad understanding of production process, cultural insight and effective decision-making (see also Lyng, 1999). These results are consistent with experimental studies done by the Baltes-group on "wisdom" in professional work (Smith, Staudinger & Baltes, 1994).

- *Senior employees are more positive than their younger colleagues.* The findings from the WORKTOW-project suggest that there are age-norms among workers that are asked to evaluate the competence of older and younger colleagues. There is a familiarity-effect since employees that are working in mixed age-groups, held more positive attitudes towards senior colleagues (Heier, Lyng & Lahn, 1997).
- *The ability to learn abstract skills goes down with increasing age.* Whereas small age-differences are expected when the output is work performance, older workers are clearly perceived as slower learners (Maier, 1998, Löfström & Pitkänen, 1999). Such attitudes are most often met in the case of ICT-training, but the findings reported above suggest that the decisive factor is related to the instructional methods and not age-differences in learning abilities.
- *Discrepancies between reported attitudes and practice* are very common . It has been demonstrated again and again that the classical discrepancy between reported perceptions and behaviour does apply for stereotypes towards older workers, for example positive views are not reflected in hiring practices (Settersten, 1997). One of the mediating variables may be the "implicit theories" of managers (Sternberg, 1985) that often lean on underlying models of linear decline that are embedded in management theory and economics (Greller & Simpson, 1999). Thus they influence decision-making in companies and by policy makers, and tend to have a self-fulfilling character since underlying assumptions are not examined.
- *Turnaround skills and flexible working life.* In the WORKTOW-material there is mixed support for a general proposition that senior employees are resisting work place changes. A key factor seems to be the extent to which they are included in the

restructuring processes, since experienced workers often have strong preferences for wholistic approaches as epistemic platforms for action (Lahn, 1999).

In conclusion the generic concepts of work and learning abilities should be broken down into different dimensions or "subabilities". Both experimental research and every day perceptions suggest that a wide range of competences are expected to develop with increasing age. In a historical perspective skills that have a declining profile, are associated with traditional industrial work – like bodily exertion, manual dexterity and endurance (Zuboff, 1988). The expansion of the service sector and knowledge work seems to favour experience-based skills like wisdom, intuitive expertise, attentiveness, symbolic analysis (Reich, 1991), relational competence, cultural sensitivity (Drucker, 1993) and learning to learn (Barnett, 1999). Irrespective of the predictive validity of these scenarios for working life in European countries, senior employees represent an often hidden source of "intellectual capital" that may take on added value in the future. Since these tacit assets are not fully recognized, and since negative perceptions may undermine the motivation of older workers and others to develop them, age-aware HRD-policies should have an optimistic basal tone. The interactions between subtle stereotypes and participation in learning episodes are complex and could be described at different levels.

At the individual level the beliefs of significant others are mediated by their attribution of own performance to internal personality traits. In turn we interiorise those interpretations in our perceptions of our readiness to meet similar challenges in the future (self-efficiency, Bandura, 1986). For example for people over 60 a high frequency of errors on new computer-based input devices may be a function of sensory-motoric slowing-down with increasing age. However others may interpret this behaviour as symptomatic of reduced mental ability, which in turn influence the performers self-perception and readiness for learning new skills. Achievement goals are lowered, challenging situations avoided and learning opportunities missed. In addition personal scenarios may become increasingly ill-structured in late life – both contributing to inefficient self-regulation of learning and perceived loss of control (Piper & Langer, 1986). Again contextual variables need to be introduced, for example basic assumptions of age decline may justify a policy of non-intervention towards senior employees and reinforce inactiveness, thus fostering a low need for low need for self-directedness and strategic deliberations about own conduct (Featherman et al., 1990).

In addition to these micro-genetic factors that could explain low motivation for learning in late career, there are several cultural-institutional contingencies that have to be taken into account, for example the level of formal training, lack of training opportunities, the absence of a learning culture, employers' perception of low return on investments in training for older employees. Learning goals in an occupational context are often defined in relation to trajectories from marginal positions to a highly valued centrality in organisational life. For adults in late career educational ambitions are justified in relation to advancement opportunities. When these are non-existent, older workers may find it hard to be accepted by others and by one self as a learner (Barnett, 1999). In one of the WORKTOW-interventions it was clearly documented that women above 50, in jobs with few career options, were not aware of any needs for personal development in occupational contexts.

Since the knowledge economy is believed to be less concerned with knowing-how and more with knowing-why, the curriculum of work-based learning asks employees to become different kinds of human beings (Barnett, 1999) and not only to be updated on technical skills. A theory of late career should therefore reflect consequential transitions within and between communities (Beach, 1999) where "consequential" refers to a process of identity change. One of the candidates in framing the WORKTOW-project, was the conceptual structure of "boundaryless careers". Below I will confront its optimistic predictions of learning careers in working life with the need for historical grounding and for a finer discrimination of individual differences.

Boundaryless careers for older workers?

The traditional regulation of the life course in distinct trajectories like schooling, productive life and retirement is radically challenged by emergent trends in the institutional structure of modern societies. Systems like the welfare state have reproduced a standardisation of life periods with sharp transitions between positions in the educational system, the labour market, the health sector and households (Mayer & Schoepflin, 1989). Widespread deregulation and individualisation of public services have taken "flexibilisation" out of the sphere of industrial production to other sectors. As a consequence the institutional ports of entry and exit to different life arenas are multiplied, and age brackets may become more diffuse and negotiable. The increasing "desynchronisation" (Ellingsæter, 1996) of life courses may force us to redefine the retirement period in terms of learning opportunities.

Recent reformulations of career theory often presuppose life course transitions that are multiple and iterative - with an emphasis on continuous learning instead of chronological age as underlying mechanisms (Bailyn, 1992; Hall et al., 1996; Sullivan, 1999). Catchwords like «boundaryless careers», «checkerboard careers», «network careers» have been introduced to underline the breakdown of internal labour markets and upwards mobility within firms (Arthur & Rousseau, 1996), the devaluation of company specific skills and the upgrading of «social capital» associated with interorganisational communication and learning.

Hall (1976) described twenty years ago a shift from organisational to "protean careers" that are managed by the person not the single work organisation. Another characteristic is the succession of short-cycle learning stages - "...mini-stages"...of exploration-trial-mastery-exit, as employees move in and out of various product areas, technologies, functions, organizations, and other work environments" (Hall & Mirvis, 1995, pp. 277). The authors suggest that this model represents a break with the classical ones in that it appreciates the potential of later career stages. In table 1 below I have listed some of the main characteristics of new careers as presented in the literature. The middle column refers to competences of older workers that accord with this theoretical framework, whereas the right complements or contrasts the column in the middle. It is based on data from the WORKTOW-project and other studies, and the relationships in the table could be summarised as follows.

CHARACTERISTIC OF NEW CAREERS	LATE CAREER AS PROTEAN	CONTRASTING OBSERVATIONS OF OLDER WORKERS
Routine-busting	Exploring new possibilities	Learned defensiveness
Continuous learning	Implicit learning	Training in abstract skills
Relational skills	Possession of "knowing whom"	Wisdom and social selectivity
Self-design	Individual proactiveness	Self-direction as a function of work environment and culture
Occupational codification	Learning career	Lost professional anchoring
Moving to the margins	Flexpertise	Liquidation and resignation
Flexibility and loss of porosity	Reflexive production	Restless learning

Table 1.

Table 1 showing characteristics of new careers in the left column and the "protean" dimensions of late career in the middle. To the right are listed some observations from the WORKTOW-project and other empirical studies that seem to contradict the scenario of late career described in the literature on "protean" resources.

- *Routine-busting*. Hall et al. (1986) and others suggest that professional experts in their mid-career are triggered to explore alternative ways of being and becoming. The literature on skills' obsolescence and our observations from high-technology companies suggest that older workers may also be quite defensive about their areas of expertise (Lahn, 1996). According to our WORKTOW-data senior employees that were used to restricted working environments, did not perceive themselves as learners, and were critical of new requirements.

- *Continuous learning* is contrasted to retraining and assumed to be a "tacit" format that elderly people are familiar with, and that recognises their prior experience as valid resources. However "textualised" professional skills may have to be acquired through an abstract rather than an experiential process (Lahn, 1998), and we found casuistic evidence for the importance of using training programs that could bridge work experience and new formalised knowledge like computer-assisted design (Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001).

- *Relational contracts* are not formally negotiated, but depend on the ability of a floating partnership to take the "perspective of the others" and make ad hoc arrangements (Weick, 1996). The life experience of employees in their late career is assumed to make them wise, tolerant (Hall & Mirvis, 1995) and in possession of "knowing whom"-expertise (DeFilippi & Arthur, 1996). Another story comes from studies showing older employees to be quite defensive when confronted with changes in social environment (Lahn & Flagstad, 1994).

- *Self-design*. The major challenge and metaskill for workers dealing with new learning careers is to be good at redesigning their own professional identity – using social networks as input to this process rather than formal organisations. For the older worker new opportunities for successful ageing are opened: Self-design is consonant with the need for autonomy in late career and with the shortening of time-horizon in life planning. The later variable should "free" the employee from putting too much emphasis on collegial competition and promotional options (Lahn, 1999). The results from the WORTOW-questionnaire demonstrate that differences in self-initated learning interact with sectors rather than age (Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001). The lowest scores are found among older workers in industrial work, and highest in the service sector. These findings are consonant with the main theses of "protean" careers.

- *Occupational codification*. Some scholars maintain that the «flexible» working life will make occupations more important in defining career patterns (Tolbert & Stern, 1991) – and employees in their late career are advised to convert firm specific skills and lojalities into professional commitments and expertise. However, many trades have lost their attractiveness as "anchoring" bases (Schein, 1998) for new and older generations of workers (Lahn, 1999), and in the printing industry adults in their 50ies could not identify with the expert domains of younger colleagues (Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001). Consequently intergenerational communication was made difficult.

- *Moving to the margins?* Older workers that have a biography of occupational mobility, are said to be in possession of flexpertise (van der Heijden, 1998). Thus they should be generally attractive on the labour market, but most often we find that this group is downgraded and finally excluded from productive life. In this situation it is quite rational for employees in their late career to stick to their employment contracts and expertise. There are also warning voices (Smallen, 1995) that point to the new control regime created by external labour market, coupled with technologies for crediting «tangible» results and visibility. Also the practice of «lean» employment and increase in part-time jobs may create a larger «secondary labour market» to which senior employees are recruited (Harrison, 1994; Alferoff, 1999; Tikkanen, Lahn, Withnall, Ward, & Lyng, 2001).

- *Flexibility and loss of porosity.* Workers that are facing multiple and short cycled career patterns, should be able to redesign their personal identities (Mirvis & Hall, 1994). Such metaskills are likely to be "scaffolded" by a rich learning environment like challenging tasks, feedback from others and opportunities for reflection and conceptual development. However recent European and national surveys on working conditions (Merllie & Paoli, 2000; Grimsmo & Hilsen, 2000) give substantial evidence of a growing intensification of work (e.g. tighter dead lines, "lean" production, re-engineering). One of the impacts of such a trend is the dissolution of porosity in the sense that arenas for reflective learning are removed. Observations from the WOKTOW-cases also suggest that slimmer production regimes reduce the available options for rotation and replacement, for example in repair shops, maintenance and service units (Tikkanen, Lahn, Withnall, Ward & Lyng, 2001). In combination this logic of "just in time and just enough" does not promote higher-order learning dependent on slack resources (decision and action room, Ellström, 1996; collective deliberations, von Krogh, Nonaka & Nishiguchi, 2001). Instead adaptability is made on ad hoc basis and amounts to what I have called "restless learning", which is hardly a sustainable strategy (Senge & Scharmer, 2001). We have found no clear indication that these trends vary with age, but recent statistics of early exit and occupational health suggest that older workers are negatively affected by work place restructurings (Lahn, 1999).

The lesson from this summary is that we are confronted with contradictory images of late career as trajectories of learning opportunities or risks. A closer look at cultural and historical contingencies may help us structure these findings. Firstly, many of the success stories of «boundaryless» paths stem from the US working life, and one may seriously question whether this vocabulary could be used to describe industrial relations and labour market transformations in a European context (Holt Larsen & Nellemann Thisted, 1998). Secondly, my own studies of occupational values suggest a reorientation among younger cohorts towards intrinsic preferences for challenging jobs at the expense of company loyalty and promotional prospects. Thus "protean" ideals travel with ease across the Atlantic as they lean on the strengthened hegemony of neo-liberalism and individualism in Europe (Lahn, 2002).

Understanding and developing learning and motivation in late career

My review of literature on late career combined with data from the WORKTOW-study could be rounded up in a few guidelines for European research on late career and HRD.

- Theoretical pluralism has been advocated as a strategy that moves forward research in unexplored and interdisciplinary areas like work place learning and career development (Hager, 1999). On the other hand my argumentation supports the need for an integrative frameworks that place the field of cognitive ageing in relation to human capital models, career theory and work place learning. Within learning theory different versions of socio-cultural theory (Cole, 1996; Valsiner & Lawrence, 1996; Engeström, 2001) have received a larger audience across many disciplines. They usually combine micro-genetic studies at interindividual level with analyses of institutional and cultural contingencies, but like many wholistic or "grand" theoretical frameworks there is a danger of them turning into monolithic world views. Thus conceptual explorations into issues of late career should include also competing perspectives.

- Multidimensional and contextualistic orientations seem to have a growing popularity in contemporary research on occupational careers. Also linear patterns are replaced by more complex ones where important transitions are believed to be made more frequent than in traditional models. What is often left out of the accounts, however, is the interaction between trajectories in work organisations and a larger cultural and institutional framework. Such a reminder should be appropriate when we want to develop a conceptual structure that makes us sensitive to the diversity of European countries. Given such a reorientation, one of the methodological implications is to give preference to longitudinal research on specific abilities in real life contexts..

- The WORKTOW-study provides data that contradict some of the optimistic predictions of the literature on "boundaryless career". Again more attention should be paid to the institutional and cultural context of HRD-policies. For older workers changing organizational ecologies represent both risks and opportunities – and those nuances are crucial to understand when practical guidelines are formulated.

- In this presentation work place learning and motivation have been at the centre of my attention. Other themes often included in the literature on late career, like occupational health and pensioning decisions, are left out. As pointed out above there is a growing socio-political interest in redefining this period as a productive and an expansive one. Thus issues of adult learning have taken on added relevance. In a working life that become more "textualised" (Zuboff, 1988) purely experiential frameworks may be rather restrictive. They may be blind to the need of conceptual and higher order learning (Engeström, 2001) in knowledge work. Contemporary literature on epistemic processes in companies put questions of justification at the centre of attention (Krogh von, Nonaka, Nishiguchi, 1999). Complex and changing environments generate a surplus of ideas, and only a few are selected and processed as useful or valuable knowledge. These are essentially collective processes, and the end product will be dependent on the mobilisation of different "voices" (Bakhtin, 1986) – also across generations.

- The recent interest in cultural diversity as a mission for organisational development (Weick & Quinn, 1999) should be related to strategies for "empowering" senior employees in business restructurings (Lahn, 1999). In this respect "broad participation" approaches to innovation could be central to the formulation of a HRD for late career. One objection is that such a strategy often leans heavily on a cultural-institutional context of tripartite cooperation that is more typical of North-European industrial relations than of the Southern part or of the US (Ennals & Gustavsen, 1998). Still I share the belief of other commentators that these ideas may form the basis for a variety of developmental methods that could be a distinct European approach to "empowerment", learning and motivation, when one of the guiding values is inclusion of diverse competences in business development.

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Internationalisation of Vocational Education:
A Case of a Music Teacher Becoming Multicultural

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Internationalisation of Vocational Education:
A Case of a Music Teacher Becoming Multicultural

by

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Abstract

Internationalisation of training and education may be contradictory concepts to intercultural education. The former supports globalisation of the economy and the latter explains intercultural communication and mutual learning. The paper will map the role of intercultural/multicultural competences in a vocational teacher's work in the field of music. The informant of the case study is a music teacher. The method that was used is a thematic interview with a narrative and biographical perspective. The multicultural dimensions of the music teachers' work is related to the field itself and to the teaching profession. Although internationalisation is a part of the objectives of official educational policy and vocational teachers' expertise, their experiences may not be explicitly utilized in teaching and learning and in staff development.

Keywords: intercultural education, multicultural competence, learning environment

Introduction

Education operates in a globalising world. Educational establishments, teachers and students live daily in a society that discusses the consequences of a global economy, changing work, wars, offences against humanity, racism and environmental problems. Such issues are covered by development, peace, human rights, environmental and cultural education. The focus of my presentation is a cultural perspective on education, multicultural education, that is expected to draw its riches and contents from the ethnic, political, religions and linguistic diversity of human communities.

Multicultural competence is acquired largely outside official education in work- and hobby-related environments. It is true that internationalisation is a goal also of official educational policy because there is demand for multicultural skills in the economy and in trade and industry. Foreign student and teacher exchanges, instruction delivered in foreign languages and credit transfer across national boundaries organised as a part of regular educational provision are established but not unproblematic practices in university and polytechnic degree programmes. Internationalism and interculturalism are a part of the operations and activities of higher education establishments. But how far are experiences being consciously exploited when developing curricula? What are the paradigms that guide instruction? My presentation takes a look at the conceptual background to multicultural education and multicultural competence. I shall also present some findings of a preliminary study based on a case study.

Globalisation, Internationalisation and Europeanisation

The aim of the internationalisation of education is student and teacher and eventually workforce mobility; European educational and research programmes were created with a view to promoting efforts to achieve this aim. They may have been first launched as experiments but since then they have become established practice. Educational organisations and above all some of their members have enthusiastically applied the European Commission for funding for projects designed by them and carried out these projects. However, this is not yet enough to ensure that such European programmes and the projects that implement them will have long-term and permanent effects on education and workforce mobility. On the contrary, it seems that during their operation European projects are what may be called flashes in the pan of internationalisation and of exercises in cultural competence. When the project funding ends, so does the relevant activity within the educational organisations.

Vocational education and training has been a part of the process of creating the European Community since the 1950s, but the first political recommendations appeared and the systematic gathering of relevant data began only in the 1970s. The higher education and vocational education and training programmes, Erasmus and COMETT respectively, were launched in the 1980s. The PETRA programme focused on the transition from education to working life. The Maastricht Treaty of 1992 further expanded the role of vocational education and placed increased emphasis on its importance. Since then, transparency of vocational qualifications and its promotion have become increasingly important as a precondition of workforce mobility. The Leonardo programme established in 1995 has made transparency a central consideration.

Globalisation involves the national and international expansion and intensification of markets. It is manifested above all in the freer and more large-scale mobility of capital and in the economic, political and cultural changes that this triggers. Globalisation is not straightforward progress towards a specific goal; instead, it is a constantly changing, even contradictory force. In this way it gradually creates social reality of new kinds where both individuals and societies come under pressure and where new avenues of action open up. Internationalisation, and regionally, Europeanisation are associated with new independence for the individual and considering people as subjects instead of citizens.

Globalisation stresses flexibility, efficiency and versatility, but simultaneously it may aggravate social inequality and fragmentation. The pressures it generates can be met by emphasising competence across the whole range of educational provision and forms of knowledge production and application from basic education to research and product development of a high standard. By favouring the mobility and concentration of resources globalisation increases regional inequality, a trend that can be countered only through the creation of centres of competence based on local-level cooperation.

Internationalisation and multicultural cooperation are no new phenomena in national education systems. What is new is that in the last few decades, internationalisation has increasingly become an option available to everyone, including those teaching and studying in vocational education establishments. A regional programme for Europe, Leonardo da Vinci, a vocational training programme launched by the European Union, may be mentioned as an example of internationalisation in this area. Traditionally, vocational education provision has been local and national. This is because the contents of vocational competence are more mutable than, those of, for example, general education. The ways in which expert workers are trained tend to change in response to shifts in national occupational structures, technological development, changing natural resources and economic factors, and the current employment situation.

The factors that have led to the internationalisation of vocational education and training provision include both trends towards democracy and equality and globalisation itself, the internationalisation of the economy. There is an indirect link between globalisation and how the structure of vocational training and vocational qualification requirements have been developed at national level. Workforce preparation is shaped by a more and more international labour market, the exchange of consumer goods and services, and multinational commerce.

Globalisation is distinguished from internationalisation, which covers interdependence between countries that is guided by national policies. Internationalisation is both a process parallel to globalisation and, on the other hand, a step towards it. As for Europeanisation, it can be considered an intermediate form of mutual economic dependence and globalisation that is in the process of freeing itself from the national foundations.

Internationalisation and the related concepts seem to be political and policy concepts. They do not necessarily include any consideration of the effects of internationalisation on curriculum development or learning outcomes, discussed more often under such headings as multicultural and intercultural education. The literature on internationalisation and that on multicultural/intercultural education do not seem to have many links. The aim of publications on multicultural or intercultural education is to make visible the effects of interaction across cultural boundaries.

Multicultural Education

The concept multicultural education covers a way of thinking, a philosophical perspective, a set of decision-making criteria and a value orientation. Its aim is to give people frames of reference for acting in intercultural situations and for meeting and serving diverse citizens and fellow workers. My conceptual explication of multicultural education reflects a multidisciplinary - anthropological, psychological, sociological and educational - approach. Multicultural education involves questions linked with and reflections on conceptions of the human being and knowledge, curricula, teaching, learning, administration and learning environments. Education includes beliefs and explanations that reveal how far ethnic diversity is being valued. An education that sees the surrounding diversity in a positive light shapes the experiences, life styles and identity of individuals and groups towards an acceptance of a multicultural world.

Culture is a multidimensional concept, and education has been given the task of transferring the cultural heritage. We speak about dominant and subcultures and macro- and microcultures. Teachers active in formal education find themselves obliged to ask whose knowledge, values and tradition are being passed on to increasingly diverse students. Educational establishments, homes, and teachers and students as individuals represent, in terms of their views of life, values, norms and communication methods, different cultures. Cultures play a crucial role in the formation and dynamic development of individual and group identities.

Depending on its particular manifestations and varying background contexts, multicultural education is defined in a variety of ways. The goals of international education are based on the UN Declaration of Human Rights and on recommendations laid down in other official documents, binding also on Finland. These aims, which stress the peaceful coexistence of nations, human rights, equality, and foreign language studies have been a part of our educational objectives since after the Second World War in the 1940s. Global education has been associated with the implementation of world citizenship programmes. Global education emphasises knowledge, skills, attitudes and responsibilities linked with perceiving and understanding the world as a single interconnected entity. Multicultural education and intercultural education have found increasing use in schools, colleges, polytechnics and universities as we have become aware of the diversity of student and work communities.

The concept of multiculturalism has been linked with what is known as the two-dimensional model of the acculturation process. Acculturation theory that emphasises multiculturalism argues that both minority and majority cultures learn from each other. Ethnic minorities preserve their traditional ways while simultaneously adapting themselves to the majority society. The majority culture, too, changes and adapts to diversity. (Laroche et al., 1998.) Intercultural education is of more recent origin as a concept, emphasising interaction between different people. Adopted in Finnish as a loan word, interculturalism is intended to stress the intersubjective nature of knowledge or action (Räsänen, 2002).

Multicultural education can be considered also as an educational reform movement and process where the aim is to change the structure of the educational system. In this context, the concept of multiculturalism brings to the fore the revision and reform not only of structural factors but also of process-like and content- and value-related components of education so as to make them reflect cultural, ethnic, racial and linguistic diversity. Kalantzis and Cope (1999) have pointed out that multiculturalism has the potential to change the environment of education as a whole, educational policy, modes of interaction in the classroom, learning materials and the allocation of resources, formal and informal learning, the assessment system, educational guidance, and school rules.

An emphasis on multiculturalism in education and on making education multicultural first surfaced in Finland in the 1990s, but international education had become a focus considerably earlier. Other countries have been implementing multicultural education as a conscious policy much longer. In the USA, abundant publication on the subject began as early as at the turn of the 1970s. The topic was discussed also in Canada, the UK and Australia. The most well-known conceptualisers of multicultural education included James Banks (USA), James Lynch (UK) and Brian Bullivant (Australia). These countries shared an experience of waves of immigrants and the resulting wide range of vernaculars, religions and different customs to be met in workplaces, schools and streets. It has been another thing how far teacher education, teaching practices and curricula have been reformed with a view to developing intercultural understanding. In Finland the University of Oulu established in 1994 a special teacher education programme with a focus on familiarity with multiculturalism and internationalism and on the ethics of education, Master of Education International Programme. Its theoretical foundations are grounded on an "intercultural" pedagogy (Räsänen, 2002).

The purpose of multicultural education is to prepare students to adapt to, live, and work in multicultural work communities and in a multicultural society. Education with the aim of promoting intercultural understanding, intercultural education, has the additional goal of training people to act, adopting a cooperative approach, as mediators and interpreters between different cultures.

The Ethical Dimension of the Teacher's Work

Definitions of teaching have varied from one period of history to another. The teacher's work has been considered as an art, a skill, an applied science and an ethical profession (e.g. Zeichner, 1983; Tom, 1984). The teacher's task has been characterised not only as one of transferring culture but also as one of fostering and evaluating it. How far is a teacher able to question prevailing structures of education if a young person's growth and the world situation call for it? Niemi (1998) and Räsänen (2000) have presented the following arguments to justify a conception of the teacher's work as essentially an ethical activity:

- Education and upbringing are value-based activities where the goal is the preservation and promotion of such good things as civilisation, development and growth.

- These activities are aimed at and find a partner in the child and the young person, whose rights and choices adults are responsible for.
- The teacher's work has a societal impact. Teachers educate the next generation.

Giroux (1985) calls a teacher who is capable of making their students see and understand the world and its people from a broad and unprejudiced perspective and who is aware of the ideological background factors and political interests that shape their work a transformative intellectual. An awareness of power and political structures is a necessary precondition for a reorganisation of knowledge and ideas (cf. Freire, 1972). Räsänen (2002) crystallises the following facets of the teacher's work as the core of the teacher's professional ethics: the basic task, values and the ethical principles that guide their work, responsibility to the different parties, and human rights documents. The central considerations involved in the teacher's work include also the pedagogical and learning-related points departure of their instructional activities.

Multicultural Competence

Factors that have contributed to a conscious interest in cultural competence include today's increasingly internationalised and multicultural work and learning environments. European and national educational programmes intended to promote international cooperation and mobility have considerably expanded the volume of student and teacher exchange and substantially increased the number of multinational cooperative projects between educational establishments. New contexts make understanding diversity, interaction skills and conflict resolution and problem-solving skills increasingly important. Nearly without exception, the starting point is expertise in a particular field or in a specific competence area. Because of this, it is probably impossible to consider cultural competence as something separate from a person's other occupational knowledge and skills. It is a part of their identity and overall competence.

When talking about overall competence, competencies are considered under the concepts of key/core competences/qualifications. The discussions on key qualifications that began in the 1970s concentrated on the renewal of occupational qualifications and on new types of knowledge and competence structure. There was as yet no emphasis on the transparency of qualifications across national boundaries or on cultural competence.

In educational policy, interpretations of key qualifications or of similar parallel concepts were defined more closely and the terms used to refer to them became established in the 1980s and 1990s. According to Kämäräinen (2002), terms and how they were used varied in different linguistic areas and in the educational cultures of different countries, but certain common denominators were highlighted everywhere. It was emphasised that rapid changes in working life meant that occupational qualifications must be renewed on a continuous basis. Reforms of initial, further and advanced vocational education and training affected the educational system environment, personnel policies of work organisations, and individual learning histories. Competence based on general and shared skills, conceptually explicated in terms of key qualifications, creates preconditions for occupational renewal, reorientation, upgrading and mobility. These discussions and studies made no explicit mention of cultural competence as an aspect of overall competence. According to Ruohotie (1999), general working-life qualifications cover

- life management skills (learning to learn, the ability to organise and manage one's time, personal strengths, problem-solving skills and analytic skills);
- communication skills (interaction skills, listening skills, oral communication skills, written communication skills);

- managing people and tasks (coordination skills, decision-making skills, management skills, conflict management, planning and organisation skills);
- boosting innovation and changes (perceptive skills, creativity, innovativeness and openness to change, an ability to take risks and an ability to create visions.

Ruohotie's accounts of general working-life qualifications and competencies foreground very general skills related to life management that go back to Anglo-American literature. Each category includes competencies that would easily accommodate cultural competence. When cultural competence is described more specifically as occupational core competence, it may be represented in terms of occupational profiles and occupational skills. The effectiveness of multicultural cooperation depends on professional expertise and on adaptation and interaction skills. It may be assumed that one acquires an cultural competence as an intercultural awareness develops into the understanding and the knowledge and skills needed to collaborate smoothly, in a varied range of environments, with diverse people.

Multicultural competence refers to attitudes, knowledge, skills and a social and cultural awareness needed when one operates in intercultural situations. Cultural competence accumulates through studying and work-based learning. Training for expertise in diverse contexts involves not only an awareness of values linked with and attitudes towards multiculturalism but also a global perspective on teaching and research. An understanding of multiculturalism includes an awareness also of one's own opinions, attitudes and assumptions, learned within a particular culture.

In order to be able to engage in team-based collaboration and teach diverse students effectively one must understand one's own and other people's world views and observe the surrounding world through different cultural lenses. Bennett's (1993; 1995) model of developing intercultural sensitivity describes changes in people's behaviour, knowledge and emotions as the learner's subjective experience of how they gradually come to understand cultural diversity while simultaneously elaborating a personal view of the world. According to Bennett, an experience of cultural diversity proceeds through six stages, with each stage involving new experiences. The first three stages (denial, defence and minimisation) reduce ethnocentrism, the idea that one's own group is absolutely unique. The next three developmental stages (acceptance, adaptation and integration) increase ethnorelativism, helping one to see one's group as one among many others. While a stage model like this carries the danger of predefining the course of individual learning, it does provide a certain general outline of intercultural understanding as a process.

A discussion of the nature of multicultural competence raises the question of whether it is a separate field of expertise or whether it is seen as an essential component of competence/expertise. It may be argued that in an internationalised world, cultural competence should be considered an internal element of every type of domain-specific expertise. From the perspective of vocational education and training and of the different occupations, broadly understood competence covers personal characteristics, core competence, and occupational skills. Personal characteristics include responsibility and commitment, emotional intelligence, cognitive ability, self-awareness, self-confidence, independence, flexibility, an ability to live with uncertainty, adaptability, and an ability to handle complexities. As regards developing multicultural competence, the emphasis lies on flexibility, self-awareness, adaptability and the ability to handle complexities. Core competence includes, among other things, methodological competence, organisational skills, communication and social skills, conflict resolution and problem-solving skills, language skills, and knowledge and understanding of cultures.

Core skills are a very central aspect of the process of developing and maintaining multicultural competence. Traditionally, general and theoretical education has been seen as the locus where they are learned. Where occupational competence is concerned core skills are complemented by basic occupation-specific skills, specialised competencies, technical and social rationality, interaction skills, and the ability to live with diversity and understand it in the context of production systems. Multiculturalism is an essential constituent of any field of occupational competence. As regards the competence of an expert, the various elements of competence are integrated into a aggregate of knowledge and skills rather than representing separate and distinct catalogues of qualities. Multicultural competence is an inbuilt element of an occupational domain and its practices and operations rather than being an external addition. In short, multicultural competence is about competence of a high standard to act effectively in multicultural work environments and learn there.

As a conclusion, differences between the concepts of multicultural/intercultural education and multicultural/intercultural competences have been understood here from the learning and teaching contexts where vocational teachers may work. The following distinction was made between the terms:

- *Multicultural education* prepares the learners to adjust themselves to live and work on a daily basis in multicultural communities and working contexts. This concept is often used in the context of adjusting immigrant groups to new home countries or in the context of mediating between different parties of ethnic conflicts.
- *Intercultural education* prepares the learners to act as interpreters and mediators between different cultures. This concept is often used in the context of international cooperation and promoting understanding between different cultures which may not necessarily be in close contact with each other.
- *Multicultural competence* refers to the ability of an expert to work in multicultural working environments and to relate one's own contribution to collaboration in such working communities.

Intercultural competence refers to the ability of an expert to work in international working environments and to promote learning between different cultures.

Among the essential elements of the profession and work of a music teacher is a moral ambition. Multicultural education similarly involves values, attitudes and a view of life. Both aspects of competence require one to pay attention to emotion, attitudes, knowledge, skills and commitment. According to Hansen (1998), moral ambition is manifested in practical action. He argues that the interest that teachers have in the moral dimension of teaching indicates what is essential about the basic nature of the teacher's work. Answering the question "What is multicultural education and how is it taught?" asks a teacher to engage in a continuous reflection on their identity as a narrative and hermeneutic structure and also to think about morality as a component of identity.

Method and Course of the Study

The case study presented here examines the process of becoming an expert in a multicultural context by using a narrative and biographical method. A narrative approach has become an established procedure in teacher studies in the last ten years. It enables a synthesis of investigations of teacher thinking and teachers' knowledge and an action research interest. As a research method, narratives and biographies help to construct a vision of teaching. They also make it possible to examine not only the culture of teaching but also teacher education and teachers' professional growth (Gudmundsdottir, 1997; Cortazz, 1993).

The method of narrative biography was considered suitable also for a study of a teacher's multicultural growth. Every expert and group of experts follow their own unique paths to internationalism, justified through the narrative method. Using narrative to go through personal experiences is a meaningful procedure for both the subject and the researcher. In a narrative, personal events are reflected on against the background of personal identity, connecting the past and the present. According to Bettie (1995), the act of narration can link collective images and individual imagination; it can also renew individuals and communities. Narration allows a person to reveal some of their identity, impossible to comprehend without the social background where it evolves (cf. Estola & Syrjälä, 1999). In a narrative, identity is reviewed in the context of a dialogue between self and environment. Narration is possible only when there is an authentic dialogue among participants who are listening to each other. People are not content to be simply heard, what they want is to be understood, which increases the self-knowledge of all parties. Narratives are born in the human brain. Their function emerges from the meaning that they carry. Because of this, narratives are good tools for the personal construction of self.

The study is based on the case of a single music teacher working in a Finnish polytechnic, whom I interviewed around certain themes. The aim was to examine a teacher's work and life and their turning points with respect to experiences of and the acquisition of multiculturalism. The research data was collected through in-depth interviewing and by asking the teacher to write a biographical CV. The scores and voice demos that the teacher used to illustrate his compositions may be considered a part of the materials. The teacher's experiences extend from memories of being brought up as a child to mature middle age, from attending comprehensive school to teaching in higher education and from going through the stages of an amateur musician and a novice musician to achieving the status of a recognised artist. Altogether, the narrative biography came to comprise some 50 pages.

I interviewed the subject of the case study in May 2002. Before that we had agreed on the interview and on my using it for research purposes by telephone. We also reached an agreement on privacy policy. Prior to meeting him for the interview I also attended two of his solo concerts and two concerts where he played his own compositions. The interview meandered, depending on the given situation, around the following themes: the elements of his competence, daily encounters involving multiculturalism, professional identity, experiences of time and place, universality, turning points in the development of his multicultural competence, and transferring multicultural competence to students. My aim was to formulate questions open-ended enough to encourage the teacher to talk about his own life, work, philosophy and experiences in his own words.

I taped and transcribed the interview. In analysing his narrative I looked first for elements of an overall account of how he had constructed his expertise and how he saw it. Secondly I searched the substantial amount of materials for concepts used by the interviewee to describe his identity and his multicultural competence. I was looking for answers to the following questions:

1. How does the interviewee define his own expertise?
2. What role does multicultural competence play in his expertise?
3. How has his multicultural competence developed?
4. How is multicultural competence transferred and taught to students?

A preliminary analysis yielded universality, linked with and complemented by the qualities of locality, surrounding nature, and national culture, as core concepts and conceptual ladders. Next I shall describe, on the basis of the teacher's own narrative, the nature of his expertise and how multiculturalism fuses with it.

The Informant

I shall call the interviewee Cyril, an invented name. He is a lecturer in guitar, a composer and a performing artist. He teaches in a music school that is a part of a polytechnic. In addition to guitar playing, the field of his teaching post covers also computer-aided composition. He has been teaching more than 20 years. Cyril has composed music for solo instruments, chamber orchestras and symphony orchestras alike. His works include also commissioned pieces. His composition have been performed in Russia (former Soviet Union) and many other European countries. The culture, history and people of another country have served as an occasion that triggers creativity and makes room for it. Below is an account of his first composition, *Dim Images*, finished in 1995 in Rome:

> *The orchestral piece is based on a dramatic idea where a person wanders aimlessly along misty lanes. The features of the oncoming strangers, obscured by the mist, call forth, in the wanderer's mind, various mental images. It is these images - impressions generated by the dim lanes of the mind - that the composer describes in his works. The work opens with an ostinatolike "walking motif" played by the double basses, over which solo melodies from different instruments weave images of the oncomers. As the passing encounters become more and more frequent, the initially rather loose texture of the music condenses gradually into the rich sound of a full orchestra. Towards the end of the piece the texture thins out once more, returning to the spacious orchestration of the opening: after the lanes the wanderer is once more about to enter an open place.*

Cyril has given solo concerts and performed as a soloist with orchestras in many countries, mainly within the EU. He has appeared on his own radio programmes and has helped to organise many events, for example a youth project in the neighbouring municipality. Cyril has directed some music festivals. Moreover, he has helped to organise guitar competitions, serving also as a judge. His languages - in addition to music - include Swedish, English, Italy and German.

How Does the Informant Define His Own Expertise?

The way in which this teaching, performing and creative artist defines his high-level competence has a distinct emotional and cultural dimension. The development of expertise depends on motivation and a *"good feeling"* about what one is doing. The informant is spurred on by an eternal pursuit of answers to the question, *"What is music, really?"* Partial answers to this question generate new stimulating questions. The same curiosity drives, spontaneously, his career development. For Cyril, expertise means not just being uncompromising about his skills in playing the classical guitar but also becoming a part of the culture of his age and being able, by means of his artistic interpretation and compositions, to reach every audience irrespective of their geographical and cultural background. It becomes obvious that as far as Cyril is concerned, it is a many-sided cultural knowledge base and a profound understanding of it that holds his expertise together. *"... this is a way of life, it's no longer a job really either."*

> *... somehow everything is linked with everything I mean we live in a world where there isn't in Jyväskylä too when I studied there there weren't many foreigners, now they are so many you see them all the time normally ... in a world where there are influences from one place influences from another place. The Japanese period is another thing that interests me well it's Japanese it's linked with Japan ... a composer that I have studied really a lot who studies specifically the relations between silence and sounds ... I mean what's silence what's sound what's a pulse what's music without a pulse those are just the same things as in nature. ... Nature in Finland in all its aspects and on the other hand this Italian culture ... music like that ... more or less I mean on the one hand that which is linked with civilisation and on the other hand that which is linked with lovely nature where people where in principle nature itself shapes things and gives you a certain freedom.*

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> *There was this magnificent spiderweb between two trees with drops of water hanging there at the time of the morning dew, then you knock it so that makes it happen in a sense it looks like something it does something happens but what's the scale. Well it starts with a sort of ... that's there, everything drops off, now it starts to drop off and, and ... yes that's right then what it goes with then these woods the silence what's it like what's it like this working pace all this is what I was thinking about when I was composing the piece.*

What Role Does Multicultural Competence Play in the Informant's Expertise?

> *"... all that music that they play on the guitar too, quite a good deal of it comes from quite a number of countries ..."*

Internationalism is a key element in the work of a performing artist, educator and composer. He has active international links. He markets himself largely over the Internet and through his publisher. He has toured mostly EU countries. Duties connected with international music competitions and contacts with teachers, students and audiences from different cultures require multicultural competence. *"... you keep your ears open, it cannot be anything else."*

Cyril considers music a language that crosses cultural boundaries. Multicultural competence is a crucial element of expertise in the field of music. Music is able to transmit universal emotions. That is, there are basic emotions and experiences common to all human beings that music allows to be interpreted personally and conveyed to other people. Music may be used to communicate, for example, perceptions of space and the rhythm of life:

> *I'm just now writing ... a concerto on a theme where the idea is this in a sense a sort of transmigration of souls the idea I mean that he's searching the shadows for himself the man in a way I mean Antonio ... has written a book like Indian Nocturno where there's a person who's searching himself for traces of his earlier life, searching India. In a sense it's a travel book about India but at the same time it's well it's a pretty interesting mystical world that's worth ... and reading, it's ... a principal character that is searching himself for traces.*

Familiarising oneself with the culture and musical tradition of one's own country and observing nature provide good foundations for intercultural communication. Formal music education introduces the student to music from different cultures - sensitises their *"musical ear for languages"* and opens routes to deepening their multicultural competence.

> *Like in language again there's this ... cultures and different things see when I been thinking a long time well I mean you say, "ulos" [Finnish for go out], that's fairly softly said, a German says, "raus", that's go out I mean, do you understand? ... I mean choosing the same particular vowel or of course any particular sound has terribly big implications outcome when you say it so that then the R sound is always something that gives you this kind of thing sometime in due time I can play another short snatch there's a song series where there's white spiders fall off the ice yes it's one of H. Huovi's texts, well and the word jää [Finnish for 'ice'] there the ä sound it's sung at a certain pitch so it sends cold shivers so it sends cold shivers clattering down your spine because it gives this certain tension and in other words the affect is terribly important and you must always ponder it when you think about it. ...It's pretty exciting that let's take this thing that when there's lots of room and pretty often in folk music too people play a melody with big intervals but when one lives in some jungle so it's microintervals like this do you understand, like, when the melody is small-scale it's a bit anxious the movements are small it's like the worm the wormling of the earth that but when there's room people have room to live in we are fortunate enough that way we have room to live in .. I suppose there's no other alternative that's how it must come I mean you must live what you are doing with every fibre of your soul and the same that is every time when you*

> *play the Lullaby to a Dead Birch Leaf there's this idea it had another its other name it had but the basic idea is I think ...*

Multicultural competence has both an experiential and a cognitive aspect. The expertise of someone who teaches, composes and performs music professionally includes cognitive mastery of the domain of music (e.g. history of music, familiarity with cultures and instruments, and familiarity with interpretive traditions). One may assume that the experiential dimension is about keeping one's ears open, mentioned in the quotation above; being sensitive to and able to recognise characteristic features of different cultures. Meeting people belonging to different cultures (e.g. student/teacher exchange, travel) and learning to know different environments at first hand can increase understanding and the depth of one's personal experience.

How Did the Informant Develop His Multicultural Competence?

> *So what should I say really it's something that, that has come in a sense little by little and I expect that's a pretty safe way it comes little by little there's none of this how they say a flash in the pan like many times what happens is that when there's something so you go like this and come back I think things like that ... it's pretty well said that my life is ... long very slowly ... I think that's well said. ... It's linked with all kinds of things. It's linked with philosophy and it's linked with the arts and it's linked with literature, all manner of things. I suppose that becomes very much this sort of a way of life. I mean in the same way it's linked with nature and silence and. ... but no one is an architect in one's own country that way I think that's a good saying it works still but it's true that people always want a certain amount of exoticism and difference.*

Cyril is a native of Northern Finland, native of the border district between Sweden and Finland. Multiculturalism has been a natural aspect of life on the border because Cyril comes from a bilingual home. In the early 1970s the Swedish television was an important source of cultural influences because that was where Cyril heard classical guitar playing, which strengthened his choice of instrument. However, he chose his instrument fairly late, when he was around twenty. His interest in playing in general was similarly a late development, going back only to his adolescence. Among his first instruments were the trombone and the baritone. As a young man he played also the piano, in the army also the trumpet. His interest in playing did not develop in a music school, as is often the case among today's young people, but in a band. Thus, the social dimension of making music was central in the early stages of Cyril's career as a musician.

It was strictly speaking only during his university years, when he shifted from light to classical music, that Cyril began interpreting the works of various composers. Playing brass instruments in a military band was rather one-dimensional, even dull. His experiences from the military band have influenced his work as a composer in the sense that his aim is to give each instrument in an orchestra as if a personal voice and space of its own:

> *"Quite often ... with the trombone you had to play back beat, which was pretty boring .... So I have tried to never write any back beat passages. ... in a sense every instrument in an orchestra is a solo instrument so to speak, I mean it should also be heard and seen, like every person in a sense should in some particular way, should have the chance to be themselves ... not something that necessarily comes true in this world, far from it."*

Thus, music can be a world where it is possible to realise or express one's *"real self"*. In his orchestral compositions Cyril wants to create music that offers the musician an opportunity to express not only their social but also their individual self.

Foreign teachers have played a central role in the development of the interviewee's multicultural competence. He emphasises the significance of good teachers - and networking/personal contacts. When one is learning the technical skill to make music and the *"grammar"* of music, the value of a good teacher is incalculable. When Cyril began his studies at the university, his first guitar teacher was a Czech. When his Italian teacher, became also a friend, this was one of the factors that have given Cyril particularly close ties with Italian culture. As a result of his friendship, for some ten years he has served as a judge at a guitar competition in Rome. His tours have also frequently taken him to Italy. An interest initially focused on music has expanded to various other areas of culture. It is music that had motivated him to study also the Italian language. Love for Italian culture has aroused an interest in the country's literature. The interviewee mentions Italo Calvino as one of his favourite authors. Experiences of Italy and Italian culture have also stimulated him as a composer. Italian audiences like his interpretations, which stem from his Finnish background. Thus, an interest in music and a student-teacher relationship that has matured into a friendship have inspired the interviewee to become intimately familiar with the culture of another country.

During his life in music, Cyril has learned to know the musical languages, instruments and musical modes of expression of different cultures (Italy, Greece and Japan are mentioned during the interview). Other cultures have served as sources of inspiration for Cyril's own work as a composer. Among the materials translated into music in his works are also reflections on the relations between natural phenomena and music and between sound and silence. Cyril ponders also over the relationship between the sounds of spoken language and the affects transmitted by music. A stimulating teacher and an extensive familiarity with music have been central factors in the evolution of his own musical vision and his own voice as a composer:

> *"First of all ... we listened to records to find about quite a lot of things, like learning from some good teacher. But then you must just find your own work and idea [...] and get to know what there is in the first place, like upper partial series and what is the tone and thinness and thickness and lightness of sound ... ".*

The development of Cyril's multicultural competence has depended both on familiarity with his own culture and strong ties with Finnish nature and on cultural competence derived from studying and living in music. The concepts of intercultural identity and competence apply to discourse about oneself and one's expertise. Universality is an umbrella concept that includes attributes of the locality, the surrounding nature and landscape, and nationality.

> *Just think about, for example, the sound of a keyboard instrument and compare it, like in temporal terms, with, say, three hours, one sound it's like our life compared to millions of years it's absolutely ... you look up and see the sky ... the Northern lights and they exhilarate you at that stage it comes to your mind that we really are small human beings here and how many different universes there might be over there that you cannot ... I mean like, no reason explains that we should be the only people in this universe or the only living creatures let's say this is how my imagination works.*

How is Multicultural Competence Transmitted to Students?

> *And it's absolutely clear that there're always people who aren't affected by some kinds of music and you must find this certain kind of universality, I mean that even though there're all kinds of musical styles people feel the cold in precisely the same way in any part of the world that is there are things that are in a sense perceived similarly. Experience anywhere, anywhere. And, and that was why I gave it that name sooner this kind of, like, universal name to it because the spider ... because it'll do in any part of the world. What's its purpose in life? Spin a net so it'll catch itself food there. That's very a simple thing. Well similarly when someone weaves what's the purpose. It's to make something warm for one's own use. I mean in some way it's, like,*

> *useful what you do. Well this sort of ... turning around there so that it won't hit the panic button like this that's what struck me ... I mean the spider, you think ... it's walking all the time.*

Multiculturalism is an inbuilt element of music. The study materials consist of music from different ages and different cultures. In the classroom music is placed in a historical and cultural historical context. Apart from music, students are introduced also to, for instance, the visual arts and cuisine of the same culture.

> *"It's this that has carried me on: how do you use this music to communicate in the world in the first place."*

It is important for successful learning that there is mutual understanding between the teacher and the student, that there is a rapport between them. For Cyril, the important thing about music is the transmission of universal emotions. He sees music as a means of communicating universal human experiences:

> *"The idea isn't to play the notes on the music sheet at home for your own pleasure but to find a way to use those notes to communicate with people".*

A musician must analyse various phenomena, things and the feelings that they arouse and develop their competence as a maker of music in order to acquire a *"musical vocabulary"* and an expressive repertoire that is at its best able to communicate universally. A professional musician's multicultural competence emerges as they work to recognise affects, examine and analyse them and seek to translate their understanding into the language of music:

> *"You must get the affect right, I mean that you must be able to convey to, like, audiences in any part of the word that this is the idea that I had in mind."*

Today the media and easier travel spread international influences effectively. There is active international teacher and student exchange in the field of music education. The educational establishment where Cyril teaches has no organised procedures for sharing teachers' international experiences among colleagues within the same organisation. The dissemination of experiences within the organisation depends on personal contacts. By contrast, the institution does have an established European cooperation network for teacher and student exchange. International workshops and courses make it possible to get the feel of other cultures. International competitions can similarly promote networking. Exchange programmes expand and deepen students' and teachers' international contacts. Exchange programmes involve also performances, which are art education also for audiences. Concerts can serve as what may be called an avenue of art education and intercultural education for recipients of art at the same time as they enable performers to become familiar with different audiences.

Conclusions

The project, which may be seen as a preliminary study, analysed the role of multicultural competence in the field of music and particularly within the expertise of music teacher. The analysis was based on narrative-biographical materials on a single person, collected through in-depth interviewing. The informant studied in prominent institutions of higher music education, attending in summer master classes by internationally renowned artists. Beside his teaching position, he has given solo concerts in Finland, in Russia and other European countries. The informant has composed music for, among other instruments and ensembles, the guitar, different chamber music orchestras and symphony orchestras. He has served more than ten years as one of the judges of a prestigious international guitar competition and taught international masterclasses. The motifs of some of his compositions derive from a place in another country as concrete images born there are turned into metaphors.

In the case study, expertise seems to be determined by the individual's identity and profession, of which multiculturalism is an integral and essential element. In music, multicultural motives and intercultural working contexts is an inbuilt element of the field: composers come from different cultural backgrounds; when one interprets compositions one must find out about their historical and geographical background; when one produces a work of art one must understand the diversity of one's audiences and work in different countries. The music teacher also have to find the ways of meeting different students' learning style.

In the theoretical section I argued that effective intercultural action requires three elements: expertise in the substance of the given field, adjustment and flexibility, and communication skills. In my informant's descriptions of his work, competence is manifested as recognition for one's work and as the mission of cultural work that is transmitted to students. The "language" of music is understood through symbols, signs, culture-bound styles and emotions aroused by the melody. Particularly feelings called forth by events that are a part of general human experience can, when awakened by music, be universal. It is an musician's and a music teacher's intercultural expertise that makes possible the realisation of this potential universality intended for a great variety of audiences is meant to arouse feelings and interpretations that are universal irrespective of place and time. For example, the icy northern cold can, when described through the language of music, give a person living in a tropical environment a sense of the cold caused by grief and loneliness. Teaching music is challenged to get students to understand that individual feelings and experiences may be transformed to universal ideas and concepts.

The experience of the informant of the case study showed that he had absorbed his multicultural competence through informal learning, in work and interest-related environments. Internationalisation is a part of the objectives of official educational policy because trade and industry stress mobility and globalisation as preconditions of growth. In education the aims of internationalisation are not necessarily implemented in daily curricula. Educational establishments and teachers might look into ways of systematically promoting, in personnel development, shared learning about multicultural experiences and competence. The further study will investigate other professionals' experiences of integrating multicultural competence in their expertise.

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Flexibility within vocational education and training in Sweden: The case of Advanced Vocational Education

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ABSTRACT

Advanced vocational education (AVE) has been an established post-secondary education in Sweden since January 1st 2002. With AVE one third of the course time is devoted to advanced application of theoretical knowledge at a workplace. From its start in 1996 as a pilot project, over 5000 students have today graduated from the approximately 250 different AVE programs available. The purpose with this paper is to present findings from a research project focusing on what has happened with the graduates entering the labour market. The significance of this paper is that it uses unique longitudinal data from three sets of student questionnaires collected in 1999, 2000 and 2001 by Luleå University of Technology and Statistics Sweden. Results of the study show that approximately 82 % of the graduated AVE students had a job six months after graduation and that about 7 % of them had continued studying at universities. The author acknowledges financial support by the Swedish office of Labour Market Policy Evaluation.

INTRODUCTION

The international developments within technology, economy and social aspects, often referred to as *Mega trends* (Hodkinson & Unwin, 2002; Nijhof, 2001; Tessaring, 1998), signified by the diffusion of Information- and Communication Technology (ICT), Integration of economies, Demographical and Socio-cultural changes, has during the last 20 years strongly affected the structure of domestic labour markets. The 'information technology revolution' (Castells, 1996) emphasised by the evolution of microelectronics, has not only reshaped production processes, exemplified by the concept of flexible specialisation (Piore & Sabel, 1984) and work organisations such as the innovation of lean production (Womack; Jones & Roos, 1990) but has also contributed to changing the occupational structures and skill requirements in a significant way (Zuboff, 1988). Even if there are writers who, rightfully, challenge the magnitude of the transformation process from earlier dramatic periods in Western history (Thompson & Warhurst, 1998), few of them can dispute that the changes within the technological, economic and social spheres are rather unique in Western society (Webster, 1995).

From a Swedish perspective, in the beginning of the 1990s it became evident that the general level of education within the workforce was lower than in most of other OECD-countries (SIND, 1991; SOU, 1992). A number of independent studies showed that approximately 50 % of the Swedish workforce within the manufacturing industries, only had compulsory school education (Aronsson & Sjögren, 1994; Ds, 1992). The accumulated need of upgrading the formal qualifications meeting the advancement within working life coinciding with a deep economic recession in 1992-93, clearly pointed that the system of vocational education and training (VET) swiftly had to be reformed into a more flexible tool for the future challenges ahead (SOU, 1993).

In response, in 1996 the Swedish government launched a new form of post-secondary vocational education called advanced vocational education (AVE). With AVE one-third of instructional time is devoted to advanced application of theoretical knowledge at a workplace. The aim was that AVE programmes should not be organised as a traditional traineeship period, but rather revolve around active workplace-based learning and problem solving within an overall educational context.

From 1997 through 1999 the pilot project with AVE was evaluated by a research team from Luleå University of Technology. The findings of the research team, in which the author of this paper was a member, stated that AVE had been very successful in recruiting students, opening up companies for workplace-based learning, and enabling students to find appropriate jobs after graduation (SOU, 1999c).

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From 1st of January 2002, AVE has been a permanent part of the Swedish system of continuing vocational training (CVT). The reform has grown considerably in volume. There are at present about 260 different AVE programmes provided within twelve different sectors reflecting the labour market. The expenditure for AVE is estimated to approximately 700 million SEK (77 million Euro) per annum (National Authority for Advanced Vocational Education, 2002). From its start to present, AVE empowers roughly 21 000 students of which over 6 000 students have graduated and set off finding jobs in a dynamic and demanding labour market.

Aims of this study

As previously mentioned, AVE has been subject to extensive national evaluation studies (Lindell & Svensson, 2001; SOU, 1999a, 1999b). The earlier studies from 1996 to 1999 have mainly focused on the success or failure with AVE with respect to providing students with the necessary training to compete for skilled jobs.

This study concerns and examines the 'output' of AVE, i.e. transition from school to work and placement in the labour market. Moreover, this study is characterised by time series since it incorporates and compares data with the first students graduating in 1999 (SOU, 1999b) with matching data from students graduating in 2000 and 2001. All three sets of student questionnaires were designed by Luleå University of Technology and collected by Statistics Sweden.

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This study addresses the following research questions:

- How many students have received a job six months after graduation and how many are unemployed?
- Do the graduates work, in relation to their AV-education, within relevant fields of work?
- Do the former students think they are more qualified and better paid for their jobs today due to their diploma from AVE?
- What do the graduates think afterwards of the level of qualification of skills provided?

SWEDISH INDUSTRY AND LABOUR MARKET DURING THE 1990S

There are a number of studies concerning the changes of the Swedish industry's structural transformation and what has caused it. It should however be first noted that this is a difficult area of research to analyse as structural transformation occurs both on a national and international level with a number of the factors of change acting both independently and covariantly[1]. Opinions differ as to how exactly these factors of change or trends[2] influence industry.

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[1] See for example Achtenhagen, F (1997) and Tessaring, M. (1998) who both use the term *Megatrends* as a common name for internationally-embracing social changes within various technical, economic, demographic and socio-cultural contexts.

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Table 1 Percentage engaged within various sectors and overall for the period 1980, 1990 and 1998.

Economic sector			1980	1990	1998
Industrial	Knowledge-intensive[3]	%	16	14	14
	Capital-intensive[4]	%	7	6	5
	Labour-intensive[5]	%	12	11	10
	Total	**%**	**35**	**31**	**29**
Service	Knowledge-intensive[6]	%	14	18	23
	Capital-intensive[7]	%	11	12	12
	Labour-intensive[8]	%	21	22	22
	Total	**%**	**46**	**52**	**57**
Other[9]		%	19	17	14
Sum total		%	100	100	100
Total		**100**	**2 970**	**3 020**	**2 740**

Source: Long-term investigation, 1999/2000, p.234. Revised.

From *table 1* above it is evident that it is foremost the service-based sector that has increased its percentage during the period 1990 to 1998. Also evident from the table is that the knowledge-intensive sectors for example *financial activities, property, rental, and consultation services* clearly grew most in the amount of employed during the 1990s. A certain amount of care must however be observed since the displacement of the economy's total volume divided between service-providing and commodity-producing sectors depends to a certain extent on the statistical reclassification[10] of professional categories (The National Labour Market Board, 1998).

Another tendency in relation to questions of education is the demand for increased levels of training within the industry.

Table 2 Difference in people in the labour force based on educational level. Period 1990-1998.

Level of Education	1990		1998		Difference	
	Amount	%	Amount	%	Amoun	%
Primary edu. < 9 år	740	16,2	359	8,4	-381	-7,8
Lower secondary edu.. 9 (10) yr	591	12,9	561	13,2	-30	0,3
Upper secondary edu. < = 2 yr	1 525	33,3	1 412	33,2	-113	-0,1
Upper secondary edu. > 2 yr	662	14,4	716	16,8	54	2,4
Post-secondary edu. < 3 yr	517	11,3	648	15,3	131	4
Post-secondary edu > = 3 yr	503	11,0	506	11,9	3	0,9
Postgraduate	27	0,6	28	0,6	1	0
Unspecified. edu. Details lacking	12	0,3	25	0,6	13	0,3
Total	**4 577**	**100**	**4 255**	**100**	**-322**	**0**

Source: Statistical Yearbook 1992, table 187, p.163 and Statistical Yearbook 2000, table 241, p.225. Revised.

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[3] Includes industries for electric- and teleproducts.

[4] Includes industries for pulp, paper and steelworks.

[5] Includes food industry, metal, wood, plastic, rubber.

[6] Includes corporate services, education

[7] Includes real estate, letting

[8] Includes commerce, hotel and restaurant

[9] Includes agriculture and forestry,

[10] The importance of reclassification and the difficulty to calculate the actual volume of a country's goods or service producing sectors is being discussed internationally. See for example Thompson and Warhurst, (1998).

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From *table 2* above it is evident that from 1990 until 1998 the number of people in the labour force with a three-year upper secondary education increased by 131 000 (4 %).

A third indicator of structural transformation is the different methods a company chooses to employ personnel. As in the case with the increased portion of service-based production this follows the international pattern. In the National Institute of Working Life report, *Transformation of society and working life* (1994) the authors point out that the portion of temporary employees increased in the same way in Japan as in North America. The following development was noted in the report:

"Traditionally the concept of flexibility in the business context refers to the activity, i.e. customers and markets. The flexibility in the relationship between the employer and employee has now come into focus and seems to promise to become an even more central aspect of a company's strategy in handling changes in the world around". (Aronsson & Sjögren, 1994)

In the recently published in Government Long-term report 1999/2000, the amount of temporary employments during the period 1990 to 1998 was estimated to have increased by 35 percent (SOU, 2000). A closer view of the development can be found in *table 3*.

Table 3 Types of employment among temporarily employed during the period 1990-1998. Women (W) and men (M). Percentage.

	Temporary post		Object- and project employment		Other*		Sum total	
Year	W	M	W	M	W	M	W	M
1990	6,8	1,9	0.8	0,9	2,9	2,0	11,8	6,1
1991	6,4	2,1	0,9	0,9	2,5	1,8	11,0	6,0
1992	6,2	2,1	1,0	1,2	2,6	1,9	11,0	6,3
1993	6,3	2,2	1,2	1,8	2,8	2,2	11,6	7,5
1994	6,6	2,5	1,5	2,6	3,5	2,9	13,2	9,7
1995	7,0	2,3	1,8	2,6	3,9	3,1	14,4	9,6
1996	6,6	2,2	1,8	2,5	4,5	3,1	14,4	9,5
1997	6,5	2,2	2,1	2,6	5,0	3,5	15,4	10,0
1998	7,1	2,2	2,4	2,8	5,5	3,7	16,7	10,5
90-98	**0,3**	**0,3**	**1,6**	**1,9**	**2,6**	**1,7**	**4,9**	**3,9**

Source: Long-term report 1999/2000, p.163. Own revision. *The category Other refers to trial employments, practical or emergency employments.

As *table 3* above reveals, the portion of temporarily employed during the period 1990-1998 increased by some 4 % for men and almost 5 % for women. The results show that it is foremost object and project employments that have increased but also emergency employments. A possible cause of the above increase of the portion of temporarily employed is allegedly the introduction of new production methods such as "Lean Production" and "Just-in-time"(Ds, 2000). Furthermore a possible cause of the increase of the portion of temporarily employed in the labour force is regarded to be the weak demand for labour during the recession that caused a situation where many individuals could not find other forms of employment despite their willingness (SOU, 2000).

Labour market's fluctuations during the 1990s

In the light of the economy's structural transformation, during the 1990s the Swedish labour market[11] was characterised by large imbalances (Ds, 2000). During the first three years between 1990-1993 unemployment multiplied from 75 000 to 356 000 people which equates to an increase from 1,6 percent to 8,2 percent of the total labour force (Ds, 2000). Furthermore employment dropped dramatically during the same period by 521 000 people (SOU, 2000). Resignations and retrenchments primarily affected the younger age groups, which over and above the increased demand for a competent labour force, was a contributing factor to the introduction of the AVE pilot project. Between the years 1990 and 1998 the amount of persons between 16-64 who were excluded from the labour force increased from 16 to 24 percent of the able working population, an increase from little more than 800 000 to 1 300 000 individuals (Ds, 2000).

During the later 1990s, the decline turned which resulted in an increased demand and growth in employment, which in its turn contributed to the situation where a number of sectors actually experienced a shortage of labour (SS, 2001b). At the turn of 2001/02, general unemployment amounted to about 4 % of the labour force (SS, 2001a), which can be compared to the year 1995 when unemployment rose to 10,1 %[12]. The recovery should however be viewed in a long-term perspective. In view of the number employed, the above-mentioned employment increase of 1997 and beyond corresponds to only 40 % of the actual levels reached during the boom years 1989-1990 (SS, 2001). In *table 4* below the development during the early, middle and late 1990s is depicted in a few branches of industry.

Table 4 Employed displayed according to main industrial areas, for the years 1990-1999. Thousands.

Branches of Industry	90-93	94-96	97-99	1990-99
Manufacture	-215	48	-3	-191
Construction	-82	0	7	-98
Trade and communication	-121	-10	26	-110
Financial activities, business and consulting services	-9	37	58	112
Education and research	7	0	37	33
Medical and healthcare	-65	-24	13	-108
Personal and cultural services	-7	7	16	28
Government services etc	-11	-5	-3	-32

Source: Ds 2000:38, p.36. Revised.

It is evident from *table 4* that the number of employed decreased during the period 1990 to 1993 in all the branches of industry except for Education and research. The most badly affected branches were Manufacture, Trade and communication and Hygiene and healthcare which decreased in total by 409 000. The branches that coped best were Financial activities and particularly business services and Education and research.

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[11] This would include the internationally observed increased economic integration and market dependence.

[12] AMS Statistics, www.ams.se

DATA COLLECTION AND METHOD

All three investigations of the former students' encounter with the labour market were carried out by Statistics Sweden (SS) by means of telephone questionnaires. The selection criterion was that the subjects had to have completed their AVE at least six months before the time of the interview.

The first questionnaire study (1999) began the 23 February 1999 and was completed the 5 May of the same year. The participants consisted of 1 293 students. Of these a total of 1 124 students answered the questions thus giving an answer percentage of 87 percent. The number of no-response was 13% or 167 persons.

The second investigation (year 2000) was performed during the period 13 January to 10 March 2000. The selection consisted of 1 499 persons. Of the net total, 1 362 people answered the questions which gave an answer percentage 90,8 %. The number of no-response came to 9,2 % or 137 people.

The third study (year 2001) of students within AVE was carried out during 11 September to 30 November 2001. The net amount of subjects rose to 3 321 people. In total 2 952 people answered the questionnaire thus producing an answer percentage of 88,8 %. The no-response totalled 12,2 % or 369 people.

Table 5 Size of subject group, no-response and answer percentage

	1999	2000	2001	Sum total
Subject group	1291	1499	3321	6111
No-response	167	137	369	673
Answered	1124	1362	2952	5438
Answer percentage (%)	**87,0**	**90,8**	**88,8**	**89,0**

Source: Statistics Sweden 1999, 2000 and 2001.

From *table 5* it is clear that overall the size of selected participants came to 6 111 people. Of these a total of 5 438 persons answered the telephone questionnaires which gives a cover margin of 89,0 %. The average total of no-responses amounts to 11 percent or 673 persons.

RESULTS

An important starting point prior to the AVE pilot project was to break the sex-typed choice of profession and therefore emphasise training that consciously tried to break these patterns (Proposition 1995/96:145). The combined total result shows that there differed only a tenth of a percent between men (50,1 %) and women (49,9 %). The results of the individual investigations however show that the differences were in fact greater. The greatest difference is found in the study conducted in 1999 where 54 percent consisted of men 46 percent were women. This relationship changed in the 2001 study where the women consisted a slight majority of 50,4 percent.

However the picture of sexual equality changes when it comes to the level of the branches of industry. The result of the study shows that gender-stereotyped choice of professions has continued. As with the study in 1999, the results show that of those that took the examination in 2000 and 2001, the portion of men was clearly dominant in the Construction sector, Wood industry, Manufacturing as well as Agriculture and forestry. Within the construction sector, the amount of men was as high as 83,5 percent. In comparison to this the number of women within the tourism branch was 77,5 percent, within environmentally-focused education women were 70,8 percent and within the nursing and caring professions it was as high 92,9 percent. The study shows that the most equal distribution of sexes was obtained in the Information technology branch, Food industry, Transport branch and within the category of Other.

Age-wise, the earlier evaluation of AVE showed that of the active students in training, just over half (54 percent) were under 24 years. Furthermore nearly a third (32 percent) of the students were in the age 25 to 34 years and that 14 percent of the AVE student were 35 years or older (SOU, 1999c). Against this background it is interesting to compare whether the age structure has since changed.

Against the background of the evaluation, *table 6* shows a displacement concerning age distribution of the graduated students. While the number of students between 16 and 24 years came to nearly 2 % in the 1999 investigation, in 2001 the same age category consisted more than one fifth (21,4 %) of those questioned.

Table 6 Age distribution of graduated students. Amount and percentage

Age	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
16 – 24	21	1,8	160	11,8	631	21,4	812	14,9
25 – 34	846	75,3	862	63,3	1648	55,8	3356	61,7
35 +	257	22,9	339	24,9	673	22,8	1269	23,4
Total	**1124**	**100**	**1361**	**100**	**2952**	**100**	**5437**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

Correspondingly students in the age group 25 to 34 years decreased from over three quarters (75,3 %) at the 1999 investigation to 55,8 percent at the time of the 2001 inquiry. From the combined picture it is obvious that this category dominates by 61,7 percent. The portion of students of 35 years and up shows small changes.

Besides sex and age differentiation it is obviously interesting to see from a labour market perspective how the current graduates are spread out in the labour market sectors with regard to their initial choice of education.

Table 7 Choice of educational direction among AVE graduates. Amount and percentage

Branch sector	1999 Amount	2000 %	2001 Amount	Sum total %	Amount	%	Amount	%
Construction	35	3,1	76	5,6	131	4,4	242	4,5
Economics	221	19,7	173	12,7	487	16,5	881	16,2
IT	183	16,3	343	25,2	802	27,2	1328	24,4
Agric/Forestry, Horticulture	70	6,2	32	2,4	93	3,2	195	3,6
Food industry	18	1,6	25	1,8	33	1,1	76	1,4
Environment	48	4,3	56	4,1	88	3,0	192	3,5
Transport	65	5,8	85	6,2	180	6,1	330	6,1
Manufacturing	234	20,8	298	21,9	298	18,0	1064	19,6
Wood industry	34	3,0	19	1,4	19	0,6	72	1,3
Tourism	144	12,8	210	15,4	338	11,4	692	12,7
Healthcare	38	3,4	27	2,0	118	4,0	183	3,4
Other	34	3,0	17	1,2	131	4,4	182	3,3
Total	**1124**	**100**	**1361**	**100**	**2952**	**100**	**5437**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

From *table 7* above it is clear that the pattern, which was obvious from the first investigation in 1999, has not changed significantly in the subsequent years. The powerful increase in the IT branch from close to 17 % during 1999 to over 27 % in 2001 can be noted. This rise is difficult to explain from the earlier branch analysis, which showed that the demand is to a large extent measured from the market turns during the year 2000.

Working studying or what?

The first study from 1999 showed that of the students that had found employment, most of them (83 %) were privately employed. Over 36 percent were active in small businesses (1-49 employees), 24 percent in medium businesses (50-499 employees) and 37 percent within large businesses with 500 or more employees (SOU, 1999b)[13]. Against that background one of the main questions of the study was to see if that trend was maintained in the subsequent investigations. It is also interesting to see the combined result of those that are currently in the labour market.

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[13] A more detailed follow-up as to which category of business or organisation the graduates ended up in has not been performed since the 1999 investigation.

Table 8 Employment situation six months after completed studies. Amount percent[14].

Activity	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Employed	845	75,2	1013	74,4	2350	79,6	4208	77,4
Self-employed	50	4,4	84	6,2	150	5,1	284	5,2
Job-seeking	153	13,3	162	11,9	240	8,1	555	10,2
College	82	7,3	105	7,7	253	8,6	440	8,1
Remainder	1	0,1	0	0	3	0,1	4	0,1
Total:	**1131**	**100,3**	**1364**	**100,2**	**2996**	**101,5**	**5491**	**101,0**

Source: Statistics Sweden 1999, 2000 and 2001.

From *table 8* above it can be seen that of the total number of graduates from AVE 77,4 % of those questioned were Employed, 5,2 % had started their own business and were Self-employed which means that close 83 % (82,6) had at the time of investigation found work. The results show also that a total 10,2 % were Unemployed and that 8,1 % have continued with studies at College or University.

A comparison between the different investigations - shows that the number of employed has steadily risen from 1999 at 75,2 %, to 2001 at 79,6 %. This trend also applies to the number of those studying at tertiary level, revealing an increase from 7,3 % during 1999 to 8,6 % in 2001. Consequently the results show that the portion of unemployed has dropped from 13,3 % in 1999 to 8,1 % during 2001.

Divided by sex, the results show that of those that have work, 76,8 % of men are employed and 6,3 % have their own business. In comparison the portion of employed women is 78,0 % and self-employed is 4,1 %. Viewed in terms of age, of those that have work the results show that the largest portion is within the age bracket 24-35 years (80,1 %) while the greatest portion of self-employed is in the category 35 years and older (8,7 %). Divided by branches, the results show that it is primarily those that are trained within Economics, Manufacturing, Transport and IT that are employed. It was not as easy for those educated within Environment, Wood industry and the category Other to find employment. The biggest portion of self-employed occurred among those trained within the categories Agriculture, forestry and Horticulture, within Construction and wihin Healthcare (12,0 %) which is higher than those self-employed from an economics background (3,6 %) or IT background (5,9 %). The high percentage of self-employed with a healthcare background is somewhat surprising. It must also be said that some of the branch groups are extremely small which makes it difficult to draw general conclusions.

Are AVE graduates working within their target professions?

It is interesting to see whether those graduates that responded as employed or self-employed are working within the fields relevant to their education. This is depicted in *table 9* below.

The total result shows that the portion active within their relevant field is high, close to 84 % (79,8). By comparing the various investigations, the results show that the lowest amount of students active within their relevant field occurred in 2000 with a percentage of 77, 7 %. The result found in the investigation in 1999 of nearly 84 % was not exceeded.

Table 9 Graduates active within their field of training after completing studies. Amount and percentage

Answer	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Yes	751	83,9	852	77,7	1979	79,3	3582	79,8
No	141	15,8	244	22,3	517	20,7	902	20,1
Don't know	3	0,3	0	0	0	0	3	0,1
Total	**895**	**100**	**1096**	**100**	**2496**	**100**	**4487**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

Distributed according to gender, the results show that 67 % of men were active within a relevant field according to their training while the corresponding statistic for women was 64,8 %. According to age, the results show that it is foremost those in the age group 25-34 years (68,7 %) that are most active within their relevant area of vocation. Among the youngest, in age bracket 16-24 years, 60 % worked within the "right" field. Of those who at the time of investigation were 35 and older, the portion of those in their relevant field rose to 62,3 %. It can therefore be seen that it is the youngest group of students that most often ended up outside of their intended goal profession.

According to branch affiliation, the results show that those trained within IT, Transport (including shipping) and Healthcare are the highest portion of graduates involved in a relevant field. Those with the lowest chance of finding a relevant vocation are within Environment and Wood industries. In this case however the branches are very small groups so it is necessary to be careful in drawing straight conclusions.

Workplace-based learning from an employment perspective

From a labour market perspective it is interesting to study how many of those employed at the time of investigation were employed by their advance work placement employer.

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[14] The fact that table 7 accounts for more students than were included in the investigation is a result of the case of a number of students within colleges also being registered as job-seekers.

Table 10 Amount and percentage of those currently employed in the same place as they conducted their work placement.

Answer	2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%
Yes	462	46,0	969	42,0	1431	43,2
No	543	54,0	1336	58,0	1879	56,8
Total	**1005**	**100**	**2305**	**100**	**3310**	**100**

Source: Statistics Sweden 2000 and 2001. Remark: This question was not included in the 1999 investigation.

As shown in *table 10* a minority (43,2 %) of those employees questioned said that they had been involved with their employer of that time during their practical work period, while the majority (56,8 %) reported that they did not. This result is somewhat surprising since the workplace-based part (LIA) of the training is viewed to be one of the success factors behind AVE, thus leading to the expectation that the greater portion of employed would land among employers they knew. The results also show in a comparison of investigation years that the amount not working with the company with whom they completed their LIA-period increased in 2000 from 54,0 % to 58,0 % in 2001. Correspondingly the number of those employed with their LIA-company decreased from 46,0 % in 2000 to 42,0 % in 2001.

According to gender, the results show a moderately even distribution between the sexes. Among those questioned 27,5 % of the men had done some part of their work placement training with their employer of that time while the corresponding figure for women was 25, 1 %. Of the portion that did not work with a LIA-company, the women constituted a greater portion (37,6 %) than the corresponding number of men (31,7 %). Age distribution shows that it is foremost the youngest group of graduates, in age bracket 16-24 years that most seldom worked for a prior LIA-company (40,3 %).

Divided according to branch affiliation it can be seen that those trained within the Transport sector (33,0 %) were employed most frequently with a LIA-company. A possible explanation for this could be according to an earlier research group's findings that many companies within this sector are family businesses who saw AVE as a step on the way to taking over the business.

Does AVE correspond to the needs of the participants and working life needs?

The question of whether the content of advanced vocational education and training responds to the students needs is essential. A vocational education that is not acceptable or is not found to be in demand by either the students or the labour market is at worst difficult to motivate. It is therefore interesting to see whether those questioned since 1999 felt if their education and training had satisfactorily corresponded to the demands placed on them by working life.

Table 11 Graduates' appraisal of the content of AVE- education and training compared to what they currently need in their jobs. Amount and percentage.

Answer	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Yes	569	75,9	591	71,3	1423	75,2	2583	74,4
No	173	23,1	174	21,0	340	18,0	687	19,8
Don't know	8	1,0	64	7,7	129	6,8	201	5,8
Total	**750**	**100**	**829**	**100**	**1892**	**100**	**3471**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

From *table 11* above it is evident that just 74 % (74,4) of those that had graduated felt that their education and training had corresponded to their competence demands, which should be seen as a good result. At the same time close to one-fifth (19,8 %) of those questioned felt that the training did not meet their expectations. Furthermore 6 % (5,8 %) of those questioned were uncertain. The results also show that the perception of the course's content-relevance remained moderately stable between each investigation. The highest percentage of satisfied students occurred in 1999 where 76 % (75,9) answered "yes" and was nearly repeated in 2001 where the amount came to 75,2 %.

According to distribution of sexes, the results show that the portion of men and women that felt that the education and training met their needs was equal at 47,5 %. However a slighter higher proportion of men were displeased with the training (13,5 %) compared to 11,4 % of women. In comparison of age, the results show that those of age group 25-34 years were most satisfied (49,4 %) and simultaneously most critical (13,5 %) about the relevance of the education and training. It should also be noted that a number of the industry branches are extremely small.

Qualifying tasks?

Another part of the question about whether AV education and training meets the graduates' and working life needs can be interpreted to the extent that AV education and training according to personal opinion has consisted of interesting assignments or more advanced work.

Table 12 Perception that AVE contributed to more advanced work assignments. Amount and percentage.

Answer	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Yes	659	73,7	655	61,2	1595	64,7	2909	65,7
No	187	20,9	251	23,4	496	20,1	934	21,0
Don't know	48	5,4	165	15,4	375	15,2	588	13,3
Total	**894**	**100**	**1071**	**100**	**2466**	**100**	**4431**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

What is evident from *table 12* is that just over 65 % (65,7) of those questioned felt that their training had contributed to more advanced and interesting job assignments. A comparison between the different investigations shows however that this perception decreased from the study in 1999 where close to 74 percent (73,7 %) of the participants felt that their training had contributed to them having more interesting work tasks.

From the table it can also be deduced that just over a fifth (21,1 %) did not regard AV-education and training to have been of benefit to their working life development. In a comparison of the investigations the portion of critical persons remained stable throughout. It is also shown that a total of 13 % (13,3) of those questioned were uncertain which is a relatively large portion. This could possibly be due to the fact that those that constitute this category are in their first job position and have nothing to compare with.

Distributed according to sex, the results show that a somewhat greater portion of men (54,7 %) than women (52,3 %) considered their training to have contributed to more interesting job assignments. On the other hand the number of men who were critical was somewhat larger (17,4 %) than the number of women (16,9 %). According to age, the results show that of those questioned the most satisfied were among the age bracket 25-34 years (56,3 %) while the largest portion of critics was among the category 16-24 years (22,7 %). Examined from the participants' branch affiliation the results show that it is those educated within IT, Healthcare and the category Other that felt their training had contributed to more interesting working assignments. The least variation in job assignments was held to be among those educated within the branches Environment and Agriculture, Forestry and Horticulture

Higher salaries due to AVE?

A third partial aspect in the question of how AVE has been received and regarded in the labour market can be portrayed by asking the graduates about salary structure. In our final report we could establish that in the investigation of 1999 there existed a substantial difference according to the graduates industrial branch affiliation. The average value where 56 percent of those questioned felt that they had received a higher salary due to their education and training is not especially high with thought to the fact that the students usually finance themselves through study loans. Against this background it is interesting to see whether this changed over time.

Table 13 Graduates answer to the question "Did your AVE diploma cause you to earn more money?" Amount and percentage.

	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Yes	499	55,9	524	48,5	1334	54,1	2357	53,1
No	341	38,2	400	37,1	761	30,9	1502	33,8
Don't know	53	5,9	156	14,4	371	15,0	580	13,1
Total	**893**	**100**	**1080**	**100**	**2466**	**100**	**4439**	**100**

Source: Statistics Sweden 1999, 2000 and 2001.

The sum total in *table 13* shows that just over half (53,1 %) of those questioned believed that their AV education had contributed to them earning a higher salary. Simultaneously over one third (33,8 %) of the total students felt that the education did not contribute to receiving a higher salary, which is poor with view to the fact that the majority of students incurred a study loan.

By comparing the three investigations the results show that the portion of those that felt AV training had contributed to a higher salary remained relatively similar and did not diverge very much. A certain decrease can be noted in the 2000 study. At the same time the comparison shows that those that felt AV education did not contribute to an increase in earnings decreased as the study progressed.

Distributed according to gender the results show that 45,1 % of men felt they had received a salary increase while 26,9 % did not. The portion of those pleased was less among the women, among whom 41,5 % perceived that they had received higher earnings while 28,3 % did not. The results also depict salary differences according to age. The greatest portion of those asked who felt they had received a higher salary payment was found among the age group 25-34 years (46,5 %), followed by those of 35 and older (42,1 %). In terms of branch affiliation the results point out that it was above all those educated with IT, Transport and Economics who received an increase in salary. The lowest portion of those who felt their education had been of benefit to their salary existed among those in the Wood, Tourism and Environmental industries.

Graduates satisfaction with AVE

An overall assessment of how well AVE corresponds to both the graduates' expectations and needs and those of the working world is achieved by first of all asking the graduates whether they are satisfied with the education and training or not. If we start with the combined result of *table 14* it can be seen that just over 72 % (72,6) of the graduates are pleased with their training afterwards. Simultaneously nearly one-fifth (19,2 %) were displeased with the training. Interestingly over 8 % were unable to answer this question specifically, which could be taken as some kind of criticism.

Table 14 Graduates satisfaction with AVE.
Amount and percentage.

	1999		2000		2001		Sum total	
	Amount	%	Amount	%	Amount	%	Amount	%
Yes	890	79,5	939	70,2	2078	71,0	3907	72,6
No	185	16,5	263	19,7	584	20,0	1032	19,2
Don't know	44	4,0	135	10,1	265	9,0	444	8,2
Total	**1119**	**100**	**1337**	**100**	**2927**	**100**	**5383**	**100**

Source: Statistics Sweden, 1999, 2000 and 2001.

In a comparison of the three investigations the results show that the percentage of those pleased with their AVE programmes dropped with 8 percent from the first inquiry in 1999 to the third in 2001. The general dissatisfaction is strengthened also by the critical response, which grew from little over 16 % in 1999 to 20 % at the 2001 investigation. It is also noteworthy that the portion of uncertain also increased by over 4 percentage points. It should however be pointed out that the question was posed generally and that there are no details to indicate what part of the education is being criticised.

Distributed by gender, the results show that the portion of women who were pleased with their training (73,2 %) is somewhat greater than the corresponding portion of men (70,6 %). On the other hand, the portion of displeased men was larger (20,2 %) than for the number of women (17,8 %). According to age it was foremost those between the ages of 25-34 years who were most pleased (73,0 %), followed by those questioned in the age bracket 16-24 years (71,3 %). The least satisfied were those 35 and older (69,1 %). This age category was also the most critical of all three where a fifth (21,0 %) were dissatisfied.

Divided by branch affiliation the results show that the most satisfied were among those trained within Healthcare, Wood industry, Agriculture, forestry and horticulture and Economics. The least satisfied were among Construction, Environment and Other.

CONCLUSIONS

Starting with the extent to which those questioned had found work, continued studies or were unemployed it was found that close to 83 % (82,6) had at the time of investigation found work. The results show also that in total 10,2 % of the graduates were unemployed and that 8,1 % had continued with studies at a college or university. According to gender the distribution of men that were employed was 76,8 % and self-employed was 6,3 % while employed women was 78,0 % and self-employed women was 4,1 %.

When we later look at the extent to which those questioned have a job within a profession relevant to their studies, the investigation shows that the portion that were engaged in a relevant occupation was high at close to 84 percent (79,8 %). According to the industry affiliation, the results show that it was first of all those trained within IT, Transport (incl. Shipping) and Healthcare who found work within a relevant professional field.

In the question concerning the importance of work placement practice (LIA) to employment, it is difficult to give an unambiguous answer from the existing data. The results show that of those that had work only 43,2 % worked in a company they had had contact with during the work practice, while a majority (56,8 %) did not. In terms of branch affiliation, the study shows that most of all it was students in the Transport sector that returned to a LIA-company. The especially high portion among the Transport industry must have something to do with the high number of family-run businesses within this industry, which was mentioned earlier in connection with the pilot phase of AVE.

In conclusion, although the results point to AVE as a successful improvement in so much as the students managed to find work after completing their training, there is no research showing what types of employment dominate or what terms of employment apply. The statistics that are available don't speak either about which categories of business or organisation the students are employed in. There is also no research showing which tasks or the degree of advancement of tasks that graduates with advanced vocational education are expected to perform for a raise in earnings. It is therefore important to continue studying the development within AVE with view to what happens to the students after graduation, not least of all concerning employment and working conditions as well as terms for competency development at the work place. Another area of interest is the relationship between AVE and the suggested reforms of vocational college (SOU, 2001) that are planned to begin in three places in 2003. The question is what consequences this will have on the whole for higher vocational training from a labour market perspective.

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ECER-Conference in Lisbon, September 2002

ECER 2002, Network 2: VETNET

Conference paper:

Vocational identity and working conditions in the sector of tourism: Teaching and negotiating identities: relations among the views of employers, employees, teachers and students

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Introduction

Based upon the presentations of some of my colleagues on the Spanish team of the FAME project[1], I intend to work here with the seven factors related to vocational identity presented by Martínez (2002), using also the discourses that emerge from the perspectives of the teachers (Ros, 2002) and the students (Navas, 2002) in the sector in the Valencian Region. We will finally relate them to the typology of discourses of the employees provided by Martínez (2002).

We will therefore use the material emerging in the discourses of employees, employers, teachers and students, even though we are well aware that those materials have been raised through different research tools and methodologies, which brings about some problems. Yet, because the issues addressed are pretty much the same, we think it pays the effort to see what are the common and differential elements in those views, even at the risk of generalizing to a larger extent that might be appropriate – because of the methodology used, we have been able to identify up to five different patterns of dicourse among employees, while we have only excerpted one discourse for each of the other groups: employers, teachers and students.

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[1] ***This work is presented within the framework of the research "Vocational identity, flexibility and mobility in the european labour market" (HPSE-CT-1999-00042), funded by the 5th Framework Programme of the European Union.***

We originally intended to search for the interactions that might happen among the different actors, in order to do so, we relied very much upon the belief that vocational identities are negotiated –this is very clearly the case between employers and employees, as it is certainly the case too for teachers and students-. Yet, we have not been able to reach the point we desired: to see those actors interplaying, particularly at the moment when students enjoy work experience placements in which they have to confront all other groups within the same time frame.

Despite this failed attempt to get into the very core of the processes of identity formation and reformulation and development, we have been able to find in our research different sources for identifying a collective identitity; and we will present those below.

These elements of a collective identity in the sector of tourism apply to how they perceive the changes and challenges in the sector, how they face them, and what expectations are raised in each of the groups.

Methodology

The main objective of this part of our research consisted of analysing the construction of a collective discourse on vocational identities in the sector of tourism in the Valencian region, and to see how the actors of different ages and positions were developing a common set of ideas related to the profession, its demands and rewards, its challenges and limitations. We were also looking for the contradictions within such a discourse, not only among the different position groups but also within them.

We therefore focused on 10 hotel companies in Valencia city, (2 or more stars), where we carried out 10 focused interviews to employers; 31 focused interviews to employees; the 16 schools which offer vocational training for the sector in the region, where we gathered 49 questionnaires; and case studies, questionnaires and a classroom debate in the 9 schools that offer level 3 VET for either restoration or hotelry. Among these students, we got information from 50 women and 36 men, ages 16 to 45. We also got a reply to the questionnaire from 27 teachers from 11 schools (18 of these teachers have worked in the sector; their ages ranging from 27 to 57).

Our attempt was to identify the discourse patterns that shape basic types of professional identity, and in order to do that we used the definition of key factors in vocational identity discourses that emerged from the systematic and comprehensive analysis from the qualitative categories that were raised from the interviews as well as the theoretical contributions we were handling for the project. Therefore, we have taken the results from the in-depth interviews with employers as an axis around which all other discourses have been allocated, in order to see the interplay among all of them. This exercise has proved to be pretty effective, maybe partly because some of the teachers and, very particularly, the students from which we obtained information, are also currently working in the sector, which allows the perspective of the employee to be a particularly useful and appropriate one.

The worker in the employer's discourse

a) Involvement in the profession (stability/satisfaction).

Employers tend to think that all of their employees are pretty satisfied with the job, showing relevant technical knowledge and a vocational sense of the work. They think that good working conditions that the company offers promote employees' loyalty to the company. For employers, there are clear possibilities of promotional mobility and training according to the employees' own interests.

They also acknowledge the importance of temporary work, as well as they reckon how arbitrary the promotion criteria are, despite they clearly underestimate the weight of bad working conditions.

b) The Significance of Work.

There is a feeling of pride of a "job-well-done" as a key factor towards quality.

Personal satisfaction is related with a vocational work. The 'professional type' is again dominating in this regard.

c) Group references.

We may talk here of a 'community model': there is strong corporate identity linked with personal identity.

Yet, there is a need of a stable worker able to identify with the company and to committ with the objectives of the company, feeling that he is working for his own future and interests.

d) Personal labour capital

Technical knowledge is highly valued, particularly new skills related to the use of information technologies, languages and customer relation skills.

The employer also values vocation, ambition, professional attitude towards work, communication and teamwork and satisfaction with a job well done among the employees.

e) Perception of the hierarchy

There is a functional understanding of the hierarchy: all the roles are relevant, playing their own functions for the global organization.

The management team appears as a coordinated working guarantee in the global organization. Intermediate managers must be trusted persons, which share the culture and objectives of the company; they also have to be experimented professionals.

f) Sense of involvement in the product

The worker, in the view of the employer, is strongly committed with his job, having awareness of being part of a collective effort. Company objectives are assumed as the worker's own goals (he feels like working for his own interest).

In intermediate managers the autonomy level demands strong personal commitment.

g) Education and training

Experience is a more valued factor than training, as a guarantee of professional behaviour. The importance given to formal professional training depends of the post in the organization.

Continuous training seems relevant because it also allows facing company production needs, as well as worker promotion and career possibilities .

The worker in the teachers' discourse

a) Involvement in the profession

Teachers tend to view, and so they recommend to their students, that workers in the sector have to be ready to move and to work hard and to accept what the profession brings. They have to be patient to find something that matches their expectations.

b) Significance of work

High competition is fostered, though the company is portrayed as a social agent caring for all of its members.

'You don't work for money here', you have to be creative and innovative, and care for your team.

c) Corporate references

Self employment is seen as a goal in the long term, particularly in the case of cooks.

d) Labour capital

The following ethical values are considered a key for optimal performance: honesty, cleanliness, responsibility, being a good colleague, patience, kindness, willingness to improve, seriousness, punctuality, discipline.

Technical knowledge is also valued as labour capital, but it is taken for granted – maybe because teachers take it for granted as that is their most important role in VET schools-.

e) Experience of the hierarchy

Teachers portray before their students the idea that superiors expect from them the same as clients do –thus fostering the notion of the 'internal client' that proves to be so useful for the purposes of the companies in the sector.

It is their own responsibility –of students as future workers- to adapt to the circumstances: the sector has its own rules and you have to take them.

f) Involvement in the product

'Your own performance is your best reward', contributing to your self-esteem and recognition among colleagues.

g) References to training

Teachers stress the importance of theoretical knowledge as well as practice. They also value the will to learn, to improve, being motivated, being aware of innovation.

It is the student's own responsibility –and it takes important efforts- to keep up to date: 'Your call makes you get involved in training'.

The worker in the students' discourse

a) Involvement in the profession

Students believe that you have to be ready to move and to work hard and to accept extra hours, long working days, working on holidays, etc.: 'If you work hard and you are good, they will know and you will be able to promote'.

b) Significance of work

'This is a call, you have to feel it'. You find your rewards in satisfying the client and in the very fact of working with people.

c) Corporate references

Working for a well known chain is good for the conditions, not always the prestige.

Self employment is perceived as a goal for some, particularly cooks.

d) Labour capital

The values of the vocation must show here for they are the key to professionality: cleanliness, responsibility, being a good colleague, patience, kindness, willingness to improve, seriousness, punctuality, discipline –honesty is the only one which does not appear here, as it did in the case of employers-.

You have to master the trade, which implies dedication, spirit of constant improvement, being ready to assume sacrifice.

e) Experience of the hierarchy

Superiors may cause problems and they are perceived as a source of conflict.

f) Involvement in the product

'Your work for yourself, then you do good for the client'. When your work is acknowledged, that keeps you going.

The quality of your work is what pays for the working hours and low wages.

g) References to training

It is important having a qualification; yet work experience is what counts mainly. Nevertheless, most of the students are attending VET to compete in better conditions.

Training is perceived as a load but it comes with the trade.

Common aspects in discourses of the different agents

a) There seems to be a 'pride' of working for the sector, and this is a topic explanation to justify its peculiarities
b) Students as well as teachers are aware of the sector trends
c) Students as well as teachers are aware of the working conditions in the sector
d) The role of teamwork is important in the sector, insofar 'we are all in the same boat'
e) Because of the emotional aspects of discourse, socialization seems to be very strong
f) In the case of cooks, there seems to be a particular community of practice differentiated from the rest
g) Many factors seem to contribute to the development of a 'sense of belonging' to the profession

h) There are opportunities in the sector and therefore professional expectations are raised at all levels

Discussion of findings

a) There seems to be a strong influence of discourses of employers embedded in all other agents

b) Such dominant discourse provides elements anchoring workers' identities: it is not strange that that discourse is that named as the 'professional' in the employee's typology

c) Socialization is purposefully promoted in both formal and informal ways, particulary fostering that notion of the 'professional' and what being a professional in the sector means: carrying it with you

d) The occupational role as well as the position in the hierarchy ladder have an impact upon identity discourses

e) Tensions are found between sources of satisfaction and insatisfaction. Anchors to solve those tensions are: the calling, the occupation ethics, common effort, identification of all with the service provided

f) We perceive a growing importance of formal education and of having accreditations, despite experience is what counts more and there is not much use of continuing training

g) We can also talk about the individualization and fragmentation of labour relations; there are no corporate discourses and workers assume this, despite the weak situation in which they find themselves. Also students and teachers take this for granted

h) Employers seem to ignore the existence of precarity in the sector, but also workers and students perceive it as caused by lack of professionality and search for identity anchors, like the 'calling', to justify this

Concluding remarks

For the sources of information we have been able to produce seven factors related to vocational identity in the sector of tourism which we have applied to the interviews with employees, thus giving room to five different discoursive types, and we have also used the same factors to develop a 'typical' discourse of employers, teachers and students: with these three actors we had different sources of information.

We are working with discourse, so we may build typologies which show main discourse patterns. The types are tools for our analysis, not an exhaustive analyses in themselves: there may be more types, but those are the ones which have evolved from the interviews we have conducted in Spain.

The elements of the professional type as vocation and a certain 'natural' satisfaction seem to be present in the discourses of all sort of agents. And this is the one assumed by teachers and students, who don't seem to realise about the other chances. It might be expected that VET would aim at that type not the others, as this is the 'most professional' one.

The technician/bureaucrat with responsibilities, a type which appears in large companies and hotel chains, is also present in various discourses: It is professional, but it is job in the end: they expect promotion and that is considered as the payback. Personal labour capital is the main element in this type: Attitudes are similar –not abilities-, but the sense of submission is increasing here, and it will even grow as the typology evolves into other types which don't enjoy the same benefits as the professional does. There may be some traces of overqualification in the sector –which nonetheless does not mean that there is a workforce appropriately trained-. There is yet work in the sector which does not require qualification. Training, on its side, is fostered when provided by the company itself, otherwise it is not regarded.

The reference group also has an important weight in many discourses: the community model is widely extended. Yet, the hierarquies are very well defined and each one addresses the immediate superiors or people below. There is more division of labour than real teamwork, yet the discourse of the teamwork is the one that dominates.

The justification of extra tasks and hours is explained via the ethic of work, but it is also that extra work what allows for sufficient earnings that the original wage does not permit.

As the typology advances, there are less vocational elements and more inner obligation and assumed duties: and it is here that the community model vanishes. Not surprising that there is more talk on continuing than on initial training.

The employer only considers staff those who are valuable for the company for their expertise, but the employer seems to ignore in his discourse the existence of thenon-qualified workforce which are part of the secondary labour market. It is not strange either that the employer tries to foster the professional and vocational model among all workers. There are certain constant elements in how workers see their roles, but it does not work in the case of peripheral workers. We don't know how the corporate culture deals with them, with those 'down the ladder'. Despite there is no unemployment in the sector, but there are certain elements which seem to point to the existence of underemployment.

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ECER 2002, Network 2: VETNET

Research workshop
Methodological debates in research on vocational identities[1]

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Abstract

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[1] Since March 2000 a research project "Vocational Identity, Flexibility and Mobility in the European Labour Market (FAME)" (contract number HPSE-CT-1999-00042) has focused on the vocational identities of employers and workers in different professional areas in several European countries. FAME is funded through the 5th Framework Programme of the European Union, with the aim to investigate how increasing flexibility and mobility in European labour markets affect the development of vocational identities.

Since January 2001, a research project 'The formation of vocational identities in Social Guarantee Schemes. The impact of changes in the educational sector in the processes of vocational training (IDELAB)" (contract number SEC2000-0801) has focused on the vocational identities of teachers and trainers in Social Guarantee Schemes, in the working conditions provided by the institutions offering those schemes, as well as on the vocational identities of the students receiving training in such schemes. IDELAB is funded through the National Programme of R+D of the Spanish Ministery of Science and Technology, with the aim to investigate how new jobs in the world of education have an effect on the vocational training provided by those occupying such jobs.

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This research workshop focuses on the study of the formation of vocational identities in educational settings. This is an issue common to two lines of research funded by the EU (5th FP) and by the Spanish Ministery of Science and Technology. The presenters of this workshop are members to the teams of both research projects, and the discussant is member of the international team of the European funded research.

The workshop focuses on methodological issues embedded in both projects: how to access workers, employers and young people in order to find out about their views on their vocational identities, how to identify the relevant elements contributing to the formation of such identities, how to gain knowledge on those aspects which are crucial for the processes of identity formation. The workshop will introduce the audience to the tools the teams have used for data gathering and will then deal with the problems we have found when interpreting and analysing the information.

Summary

Two research projects in which the presenters are taking part are currently working on how vocational identities are formed. The presenters are studying such issues in the region of Comunidad Valenciana, and they have already done the following:

FAME. 30 interviews were conducted to managers in companies in three occupational areas (hotels, car maintainance and supplies, and departments of radiodiagnostic of hospitals). Following this, in-depth interviews have been conducted to 90 workers in those companies. During this process, we conducted also questionnaires to all teachers of these areas in vocational education schools in the region. We also conducted a series of activities with all students in those areas, related to their expectations on the profession they are currently studying and how they are forming their own identities.

IDELAB. We have conducted similar research work in a very particular context: the Social Guarantee Schemes in the region. These are one-year educational schemes for young people with no degree training for a profession at a level 1 qualification. There are approx. 200 schemes in the region, and we gathered data from 60 of them as follows: a questionnaire to managers of the schemes, a questionnaire to educators and a questionnaire to workers training young people for those qualifications. This being the first phase of the research, we then run a second round of data gathering, this time using in-depth interviews which were conducted to 72 of the trainers and educators. The remaining phase will consist of approaching young people in order to find out how they are forming their vocational identities.

We have used a series of research tools consisting basically of questionnaires and in-depth interviews. A biographical approach lies behind our effort, as identities are formed through time and in relation with others; and we are interested in checking the relevance of training and of learning, both formal and informal, in such processes. Furthermore, the expectations raised and the career prospects are also a crucial element in the study of vocational identities, because they are the base upon which further training is decided and they point at the relative role of work, of one's profession, in relation to other areas of one's self.

These elements are of particular interest when dealing with professionals of education: teachers, trainers and educators, specially those training young people for a job (qualifications 1 to 3), not a career (qualification levels 4 and 5), are important because their views on work will be taught to young people, who will then be confronted to personal histories, not only to teaching material or to the skills which they are to be competent. Beyond each of the tools we have used for our research, it is very important to try and keep them together, to make a relational use of such tools: here is where we come to our main research problems.

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The meaning of a text is not being once and forever. It is needed to contrast the text of my life with the text of other lives. Interpretative comparison is fundamental to give meaning to existence

(Bárcena and Mélich, 2000, p. 109).

INTRODUCTION

In this research project, we intend to get feedback and critical comment on two research projects on vocational identities. We have used a qualitative approach in both of them, yet both entailing differences for the object of study and the scope of the research. We have had to choose which approaches suited our aims best, considering narrativities of different kinds, like life histories, content analysis or social discourse analysis.

'Human time is not a simple sequence of instants, moments, 'nows'. Human time is a interplay between past, present and future. Action may be narrated, may become an argument, a narration, precisely because it is time' (Bárcena and Mélich, 2000, p. 108).

We will describe here the methodologies we have finally used and will inform you about our problems when handling then, referred to data gathering, interpretation of the data and presentation of the results.

In order to do so, following Gallart (2002) we will describe each of the projects, explaining what the research design has been in both of them –the definition of the context and the units of analysis, the intended level of analysis and the hypothesis and assumptions behind our research-, the processes of data gathering –including the definition of the cases to observe and compare, the criteria to select sample groups, the tools designed to obtain the information and the strategies to approach the informants-, our understanding of the observation units –professional communities, organizational units, the social categories to which the individuals belong-, the fieldwork process –our attempt to capture processes, not only the version of the actors, to register the language of the actors while keeping it different from our own assessment of their views-, the registration of the information –our attempt to comprise all relevant information, to facilitate our analysis and to allow us to go back to the original sources and reinterpret it; as Gallart says, to get a ‚puzzle to be put ensambled and dismantled and reensambled, but always keeping the original pieces' (2002, p. 344)-.

In our analysis, in both projects, we have tried to keep the original language, to grasp the definition of the situations researched as viewed by the actors involved, to grasp their views of their histories and conditions, to identify their strategies to cope with them –whether they were or not conscious-.

We started our work in both projects by looking at previous research. Despite there were common elements between both projects, our search brought us down through different lines of analysis, for the different composition, expertise and scientific interest in both terms, for what might be useful for the whole research as well. Yet, we have also shared a partially common background of theories and concepts: Dubar (1991, 1995), Sainsaulieu (1995, 1997), Sennett (2000), Carruthers (2000), Castells (2000), Francfort et al. (1998).

In both projects, we decided to take into account as the units of analysis entities which shared a set of common criteria which provided for similarities in the areas of interest of the study, yet allowing for a maximization of features which would allow for establishing internal comparisons. We were also looking for the integration of individuals' strategies within intermediate structures –the companies they were working for-.

As a result of our participation in both projects, we are being able to explain what has been observed, and we are trying to do so by the development of typologies, to arrange the cases and allow for particular hypothesis: these types have a theoretical nature, yet they have an empirical ground. It is hard to find any of those ‚pure' types in real life, yet all what will appear in them has evolved from the data we have gathered. They are, therefore, a selection, or combination of elements which have appeared in the fieldwork. In this sense, they have been built for research purposes, in order to facilitate the analysis and comparison, to look for the differences rather than for common elements.

These will allow us, we hope, to grasp identity processes of people at work, to understand them and contrast them with literature in the field. These will allow us, we hope, to understand people's strategies in order to cope with the structural conditions in which they are located at work, taking into account both their fears and aims as well as the planning of the effects they expect to raise from their actions as they preview and try to configure their working and life futures. Again following Gallart, when developing these typologies of strategies we may find strategies that are not explicitly said, that arise from the analyses the researchers perform on objective situations, the discourses of the actors, also related to their behaviours and their consequences.

Yet, when presenting this paper we are yet facing some difficulties, many of which are related to the presentation of the results: the huge amount of material we have –in the case of FAME in seven different languages-, the different sources of information we have handled, the attempt to produce a theoretical discourse upon a complex object like vocational identities, the risk to summarize information which will mislead further attempts to understand what needs lengthy descriptions to (re)present the problem in context, the provisionality and idiosincracy of the results. Not to forget about the audiences to whom these results may be worth presenting: from the very actors involved in the processes to others in similar positions, the scientific communities which may be interested in the issue, yet with different approaches and perspectivees. The cost of such a research approach is great, yet there are a few criteria which support it: to allow for a thorough understanding of the issues, the legitimacy of the results, the comprehension of the processes and situations in which the actors take part; as well as the consideration of the perspectives of different actors, which helps contrasting positions and perspectives to limit the biases. Again following Gallart, one of the main values of this research is the use of criteria for analysis and explanation which are related to the sample where the sources of information are, thus combining the theoretical as well as the empirical ground, facilitating also the validity and objectivation controls in the very process of data gathering.

THE PROCESS OF RESEARCH: THE CASE OF FAME.

Under the framework of the research project "Vocational identity, flexibility and mobility in the European labour market –HPSE-CT-1999-00042", we have conducted research in three sectors undergoing important changes in the regional labour market. Our objective was to analyse the construction of vocational identities in some important and innovating sectors in the a regional context, as the case of tourism, metal and radiodiagnostic for the Valencian Community.

The framing context for FAME objectives is the fast changing demands for workers identity in the global labour market. The key questions, that were discussed in preliminary meetings, were the identity formation processes in a time of change and the responses those processes were demanding from individuals in different occupational groups; as well as what does an occupation in changing sectors mean for the employees' lives, and what are the skills, attitudes and strategies they need to cope with those changing situations.

These main questions drew a complex picture: from educational pathways to opportunities and needs, through work-related reference groups and career expectations. All of those were also taken into account from different countries in the European Union, which meant an heterogeneous cultural matrix for the research which may be described as follows:

CZECH	ESTONIA	FRANCE	GERMANY	GREECE	SPAIN	UK
Tourism				Tourism	Tourism	
IT Telecomm	IT Telecomm	IT Telecomm	IT Telecomm			IT Telecomm
	Health / Nurses	Health / Nurses	Health / Nurses		Health / Radiographers	Health / Nurses, radiographers
	Metal industry Timber	Metal industry	Metal industry		Metal industry Automobile related industries	Metal industry

Not only we had different sectors to study, the expertise of the research team in each of the countries varied also widely, comprising areas such as sociology, labour market assessment, vocational education, economic aspects of vocational education as well as psychology.

So, we found at least four factors to be taken into account in our work:

- Objective and subjective issues around labour identity formation processes.
- Different cultures and economic dynamics in each country.
- Different sectors (with heterogeneous structures, organization and personal dynamics, and cultural issues).
- Different academic approaches (including both theoretical and methodological perspectives).

All these questions were asking for a systematic and coordinated work, which took into account methodological coordination -common criteria for the sampling, production of tools, procedures of analysis and ways for presenting the results- as well as theoretical coherence – to allow for the coordination and common construction and discussion of research findings-.

How did we conduct all these issues in our project? What were the main difficulties in it?

1. Preliminary phase.

Preliminary meetings dealt with four issues:

a) Coordination level.

The mayor concern was to which degree the partners needed to agree upon a certain level of coordination and harmonisation of the different methodological approaches applied during the interviews.

Some of the project partners favoured a no-agreement approach, leaving it to each partner to choose the method best suiting the respective cultural context. Others preferred a more coordinated methodological apprach. Decisions at this level influenced how the partners would select the interviewees and how we would conduct and evaluate the employee interviews. In the end, a common methodological frame was accepted.

b) Key areas.

Partners reached an agreement (provisional at that moment) on the four key areas for guiding the process of gathering the data. These key areas intended to provide a framework that could guide the semi-structured interviews:

- Learning (background, orientation to learning and knowledge, and especially learning related to working processes);
- Relation to work (attitudes, orientation to work, performance of role, organisation);
- Interaction with others (relation with colleagues and others);
- Appraisal or evaluation of current situation (self-reflection; orientation to own performance).

One question was if these four areas needed to be further specified to ensure compatibility of interviews across the partner countries. But choosing the semi-structured interview as the tool for data gathering, we opted for an open approach. Given that we were looking for employees' discourses, we had to respect different contexts and cultural settings for constructing information. Then the compatibility would be reached working with an agreed set of categories for analysis as well as through the ways of presenting and sharing the results.

c) Selection of the sectors.

It was based upon each partner's report of interesting changing dynamics in main sectors in their country and/or regional contexts. The agreed criteria at this level were:

- To be useful for the analysis of FAME assumptions;

- To be an innovating sector;
- The relevance of change in the sector upon working conditions.

In the case of the Valencian Community, the sectors were tourism (hotel workers), health care (radio-diagnostic) and metal industry (automobile-related industry):

d) Pilot interviews.

Each partner conducted a series of pilot interviews (approximately six) in each chosen sector, in order to assess the feasibility and validity of the methodological approach chosen (and discussing it with partners for getting a common approach); to see if the outcomes were useful; and to get ideas for constructing a definitive interview guide.

2. Second phase: approaching employers' views.

In order to have a panoramic view of the sector, and to have a contrast approach on the discourses of the employees, in this phase we started from the employers' views of the sector and the needs of workers in it.

We made focused interviews to ten employers or high managers per each sector (approximately, 30 interviews). We understood that in this way we would get the formal discourse of some companies, that were the context in which workers' identity develop, as well as the milieu for us to conduct interviews with employees.

The interviews dealt with common issues for all the partners:

- Data concerning the company;
- Work organisation;
- Recruiment criteria (what kind of employees is the company looking for);
- Human recourses management;
- Changes in work and professional requirements;
- Continuous education and training.

The evaluation criteria of those interviews were discussed, and some questions were clarified: the need of having into account the view of structural changes; the comparison between sectors; to look for the changes and to relate them to identity, flexibility and mobility issues.

However, considering the wide field and range of structural and personal aspects which affect the process of occupational identity formation, the project consortium had to find an operational frame to evaluate the material. The evaluation of the employers' perspective focussed on three key dimensions, which are critical for the process of identity formation:

- Learning: How formal and non-formal learning are perceived by employers; how do they appreciate qualifications acquired through the initial formal learning system; how do they promote, assess and take into consideration further work related learning; to what extent the workplace constitutes a poor or rich learning environment; the effect of the latter on employees' work-related identity formation and development in particular, and their socio-professional promotion in general.
- Organisation: Dominant organisational structure of the institution; dominant work organisation; forms of related labour flexibility and mobility and their effects on employees' identity formation, learning and socio-professional promotion; perception of hierarchy; career options.
- Individual: Initiative; autonomy, responsibility; communicability; time and functional flexibility; mobility (promotional as well as horizontal); forms of identifications (with product, service, team, company, professional community…).

In each case, all these dimensions would be regarded to their capacity to influence on and their need for mobility and flexibility.

3. Third phase: getting the views of employees.

At this stage, we worked with the employees' perception of the sector and their vocational identities. We expected that the previous phase would show some of the hard-to-solve tensions and contradictions arising for individual employees from structural and ideological demands and from the fast changes in occupations and workplaces.

Therefore, in this phase on the employees' perspective, the questions were:

- If and how employees develop strategies to cope with these possible contradictions?
- How do such strategies look like?
- How do they affect the identification and commitment with work?

We made 31 interviews (semi-structured and focused) in each of the three sectors per country. We based the selection on the workers trying to focus on the companies in which employers had already been inteviewed, in order to facilitate the contrast on data and to improve the quality of them, having more contextual information to anchor them. We tried to cover different ages and gender, as well as different departments in the companies, several functional positions, as well as employees with and without formal responsabilities. As regards qualification level, we tried to cover different situations, but all workers were positioned in jobs for which, nowadays, there exist a recognized vocational qualification (initial, VET or university).

In the sector of hotelry, we interviewed thirty one employees among hotels with a minimum of two stars. As a whole, the interviews took place in eight hotels, all of them located in Valencia or the surrounding area. The ages of the interviewees varied from 21 to 57. There were 14 women and 17 men. Ten interviewees worked in reception desks and departments, seven of them in the kitchen, four of them in restoration services, seven of them in several management departments (commercial, booking, staff etc.) and four of them in cleaning and mantainance areas. 14 of the interviewees held some kind of responsibility, in the form of intermediate management.

In the sector of radiodiagnostic, we conducted thirty interviews to workers in the radiodiagnostic departments of both private and public hospitals. As a whole, we conducted the interviews in five hospitals, two of them private, three of them public. Interviewees' ages ranged from 22 to 50; there were 23 women and 7 men. All of them had the appropriate vocational qualification –level 3- through formal initial vocational education. Most of them – sixteen- worked in the radiography department or in the emergency room (eight of them); only two of them handled more modern technologies (one in CAT and one in MRI); and four of them did have positions not clearly specified. Finally, with regard to their labour situation: nine workers held unlimited contracts (either laboral or civil servants), five of them temporary (replacement contracts), eight of them interim and eight of them were subcontracted as autonomous.

In the sector of metal-mechanics, we conducted 31 interviews to workers in workshops, both in a large factory owned by a US company as well as dependent of official car dealers and small workshops. The ages of the interviewees vary from 22 to 57, all of them being men. We conducted the interviews in seven companies. The functional profile is as follows: five heads of workshop, three commercial and administration employees, three trade officials (two mechanics and one in sheet and paint), four second class officials (two mechanics, one electrician and one in sheet and paint), six first class officials (four mechanics, two electricians) and three mechanics and two specialists in sheet who did not specify their level. All of them are in jobs for which there is nowadays formal initial vocational education.

The structure of the interviews was agreed to consist of an individual focused interview (opened but with a guide) exploring the four key focus areas (learning, organisation, autonomy/responsibility and individual strategies to deal with changes and demands). The interviews content was analysed in a systematic and comprehensive way. This analysis started from qualitative categories that were defined from the interviews discourse and some theoretical contributions[2]. The result was a series of key factors (see the picture) in the vocational identity discourse of the workers. These factors were agreed at a projecte meeting as the analysis criteria, and allowed us to define discourse patterns of vocational identity.

Our objective was to identify, on the basis of the qualitative analysis, the principal discourse patterns that shape distinct basic types of professional identity. These types should be understood as "pure types", which serve as tools for next analysis. They were not intended as an exhaustive typology of identity; rather they constituted a basic definition of types that allowed us to organise the most relevant factors that appeared in the interviews.

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[2] Beck, U. (2000), Dubar, C. (1991), Sainsaulieu, R. et al. (1995), Bourdieu, P. (1999), Sennett, R. (2000).

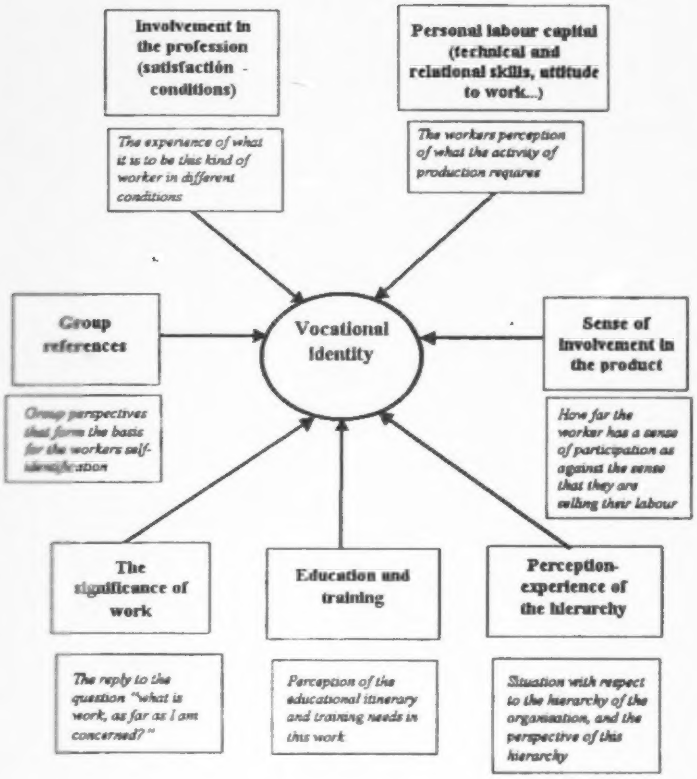
Involvement in the profession (satisfaction - conditions)
The experience of what it is to be this kind of worker in different conditions
Personal labour capital (technical and relational skills, attitude to work...)
The workers perception of what the activity of production requires
Group references
Group perspectives that form the basis for the workers self-identification
Vocational Identity
Sense of involvement in the product
How far the worker has a sense of participation as against the sense that they are selling their labour
The significance of work
The reply to the question "what is work, as far as I am concerned?"
Education and training
Perception of the educational itinerary and training needs in this work
Perception-experience of the hierarchy
Situation with respect to the hierarchy of the organisation, and the perspective of this hierarchy

Figure 1. Key factors for a mapping of professional identity

4. An appendix for the third phase: approaching VET teachers and students.

At the same time that we were interviewing employees in the companies, we intended to approach also VET teachers and students in order to get an overview of what was the impact of the issues of our study upon current VET practice in the sectors studied, as this might give an added value to our research (Kim Cho and Apple, 1998; Popkewitz, 1988; Eisner, 1998).

On the one side, some of the teachers in the VET system may be at the same time professionals working in their sector of expertise. Furthermore, given the new model of vocational education in Spain, it was not strange to assume that some students would be workers trying to achieve a formal professional accreditation which they lacked in the moment they entered the profession.

For this contrasting research, we intended to find grasp issues like what notion of work is taught in current VET courses; what notion of work develop VET students –including area such as the specific activity to perform, social relations at work, labour relations (conflicts,

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wages), what is demanded of them (flexibility, adaptation, continuous learning)-; as well as the sort of work experience and introduction into the world of work that they were getting.

We then decided to send a questionnaire to all VET schools in the region teaching the professional qualifications at level 3 preparing for those professions in which we were interviewing employees. We decided also to address all students in the region who were studying the subsectors of all three professional families in FAME (health: radiodiagnostic; metal mechanics: automobile industry; tourism: restoration and hotelry). The tools we designed for students consisted of three different classroom activities –in the subject area named 'introduction to the world of work'-: a) an open debate upon the case based on a story of a worker in the sector –arising from the pilot interviews we had conducted with employees-, b) an open collective commentary on a series of slides showing different real working situations in the professions for which they were training, and c) a brief individual questionnaire dealing with some of the issues we were addressing in the in-depth interviews with employees. This information was recorded in tapes and transcribed, while the questionnaires to teachers were sent by mail.

In order to build those instruments, we used different sources of information like our pilot interviews, their curricular prescriptions -professional profile and contents of the modules-, the collective bargaining agreements -except in the case of radiodiganostic, for which there was none-, as well as FAME related papers -conceptual, views of employers, developments in the sectors-.

For metalmechanics, we got information from 14 different schools, where 280 men and 2 women took part in our research, ranging from 16 to 37 years old. Also 45 teachers from 18 schools (25 of which have worked in the sector; their overall ages ranging from 20 to 61) replied to our questionnaire.

In the case of tourism, we got information from 9 different schools, through 50 women and 36 men, ages 16 to 45. We also got a reply to the questionnaire from 27 teachers from 11 schools (18 of which have worked in the sector; their ages ranging from 27 to 57).

In the case of radiodiagnostic we got information from the two schools where that qualification is taught, with XXX, their ages varying from 18 to 50. 75 teachers from 22 VET schools teaching health –not only radiodiagnostic- replied to our questionnaire (51 of which have worked in the sector; their overall ages ranging from 26 to 65).

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THE PROCESS OF RESEARCH: THE CASE OF IDELAB.

This project intends to identify changes in vocational identities and practices of trainers and trainees, in the understanding that such changes will happen as a consequence of the transformations that the educational sector is suffering, particularly in the area of vocational education and training.

We have chosen as our research context the case of Social Guarantee Schemes, because they are an educational offer which intends the professionalization of young people with no accreditation. They have a recent history, as they started only in 1994, being regulated by the Spanish Educational Act of 1990.

Our research approach is that of qualitative research (Alonso, 2000) and from an interdisciplinary perspective: there are social psychologists, developmental psychologists, sociologists and pedagogues in the research team.

The questions that made us start this project are the following:

- To describe the emergent trends in vocational training systems considering current reforms in the educational system and in the labour market;
- To describe Social Guarantee Schemes within the frame of the policies set to facilitate transition from young people into the labour market and adult society in general;
- To analyze the features that define the trainers in such SGS;
- To describe the basic keys that are shaping vocational identities of young people attending such programmes as well as their trainers: their views on work and how they understand themselves as workers and as collective groups defined by a professional/vocational dimension;
- To provide useful information to take decisions on the design and management of policies addressed towards social and labour insertion of young people.

It is our assumption that the educational system has resulted more reluctant than other sectors in the labour market to flexibilization, innovation and experimentation of new types of management and new sorts of practices. Nonetheless, it is the educational system itself that, to a large extent, has provided the human capital able to satisfy the demands and requirements of a labour market under the process of rapid change. This has led to a disadjustment between a) the representations of work that trainers have and teach to their students and the representations of work that are embedded in the institutions in which they work, highly bureaucratized, fragmented and formalized, and b) the demands and expectations that employers have regarding their future workers. To be aware of this problem and to misuse

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economic and human resources has led in the past decades to a continuous effort towards decentralization, flexibilization and to facilitate innovation in all levels of the educational system. As a consequence of this effort, the development and scope of the educational system has expanded far beyond its traditional area of influence. Also as a consequence of this, the vocational identity of trainers and educators in the educational system is currently suffering a process of deep transformations. This is even clearer in educational areas traditionally considered as peripheral to the system, that are usually those which are oriented towards professional training rather than academic teaching, with education out of school and with training offered to young people who have failed in the educational system. It is in these areas where flexibilization, decentralization and administrative deregulation and innovation in the types of management is greater and has accelerated nowadays (Bárcena and Mélich, 2001; Bernstein, 1998; Bolívar, 2001; Casey, 1993; Paugam, 2000; Gorz, 1997; Crespo, 1998).

From our perspective, these are some of the transformations in the nature of educational processes in vocational training that we must look at in detail in order to describe and understand them, so that we are able to preview the effects in the medium and long term of the trends in the wider educational system and the structure of the labour market.

In order to understand and preview these changes, SGS offer us a great chance to study and analyze how and towards where such transformations are happening in the educational processes of construction of vocational identities of young people attending new forms of education and training out of the traditional academic pathways. It is also a privileged *milieu* in which to look at the transformations of vocational identities of trainers and educators, which do take part of the wider socioeducational sector which is nowadays expanding.

Social Guarantee Schemes are particularly relevant for this purposes in the Valencian region for the following reasons:

- They are different with regard to other forms of vocational education and yet they have as an explicit aim the professionalization of young people –despite this is not the only aim, competing with reentry into the educational system and personal development-. This is why socialization in the traditions and uses of the world of work is an important element in the curriculum together with specific training in an occupational profile;
- They are flexible in the way they are funded, regulated and organized: there is a scarce level of formal regulation which makes it possible for us to find out many different forms in which promoting institutions run these training mechanisms;

- They systematically differ according to their relation to work: there are up to two different forms of working practice out of the educational setting: education and training –a working contract- and introduction to a profession –work placements-; both of them approaching the world of work differently;
- They allow a wide array of labour conditions, so that we may assess them and their implications upon the construction of vocational identities and of understanding work;
- They are addressed to a population which is very young and with very low professional qualifications and expectations;
- Each programme has two trainers well differentiated: a teacher providing basic education and skills and a trainer specialized in the occupational profile of the programme; both figures seem to differ systematically in their representation of the educational aims that are important to work with the trainees, and they allow to contrast references about vocational identities and the cultures of work;
- Finally, the wide array of occupational profiles offered under the Scheme allows also for the coexistence of programmes aimed to traditionally handcraft occupations together with other emergent qualifications usually referred to as 'new labour pools'.

For all these reasons, we approached our research trying to make the most out of our interdisciplinar cooperation, also through the use of a plural methodology and the triangulation and contrast of the perspectives of the different agents involved: trainers, teachers, managers and trainees; as well as the mentors of the students at theworkplaces.

We have developed three major phases along our research work:

1. Preliminary phase: setting the context of research.

We included here several research tasks:

- A historical and comparative contextualization of current policies for sociolaboral insertion of young people;
- The empirical description of the policies of SGS developed in the region in relation to their structural and organizational aspects, taking into account the changes in the regulations as well as the trends shaping the sociodemographic and labour profile of both the promoting institutions as well as the trainers working in them;
- The analysis of the potentials and specificities of SGS in the Valencian region compared to their management and regulation in other regions in Spain, all of these

read within curent policies for facilitating entry of low qualified young people into the labour market.

2. Second phase: researching vocational identities of trainers.

The aim of this phase consists of obtaining information allowing us to describe the variety of trajectories and vocational identities that find themselves among those playing the role of trainers in SGS, and to punt those in relation to the strategies they employ and the emphasis they put in their educational practice. That is the reason why we chose to interview some trainers, after having obtained data of their socioprofessional status and practice through a questionnaire.

The interviews have a pretty detailed guide, adapted to the interviewee and to the course that the interview follows. The interest of the interview is to cover certain areas rather than to get an answer for certain questions. The interview guide includes the following topic areas: a) autobiographical information, b) current working situation, c) vocational identity data, d) professional practice and their own assessment of it, e) their views on their addresses, f) their perception of their vocational identity and how they refer to it, g) their percepction of what does a SGS consist of, h) motivations and significance of work and their social representation of the labour market, y) their representation of the educational system and its relation to the labour market and, j) their assessment of their personal situation.

By the end of June 2002 we had interviewed 14 trainers, and we intend to interview a similar number during this term. Those 14 people work for seven different institutions and programmes. We decided to take the programme as the unit of analysis, that is why we have taken both the teacher and the trainer in each Scheme. We chose those particular schemes trying to maximize ‚a priori' the diversity of vocational identities we might find among trainers. Therefore, we tried to a) get workers from all types of institutions running SGS – public secondary schools, private secondary schools, non-profit organizations and municipalities-; b) that each SGS would cover a different occupational profile in order to get as different as possible a trajectory of trainers in them –varying from electricity to shopping, metal welding or gardening-; c) to get institutions from either Valencian metropolitan area as well as from rural areas in the region; and d) to include at least one SGS attending young people with psychical education needs, given that this is a particularly differential area. Taking into account those criteria, we chose seven programmes among all those active last year and we wrote a ‚reserve' llist of other ten in case there were any problems with these. All of the institutions and workers agreed to take part in the research.

Two members of the research team conducted the interviews, in two sessions each, transcribing the first session before the second one so that the interviewee might comment on this transcription. The period between both sessions was of approximately a fortnight. We chose to do so for several reasons:

- the total length of the interview –from two and a half hours to four hours- was far too long for a single session;
- the space between sessions could allow us to ‚inditivualize' questions for the second session. The first session focuses on biographical aspects, current working conditions and tasks of the workplace. The second session tries to focus on the trainer's discourse on the benefits and aims of the scheme, her view on the education system and the labour market, her own assessment of her labour and job and some subjective issues on the significance attributed to her work. These questions of the second session are harder to talk out loud, so the first session might provide us with certain elements to raise these issues.
- To go back in the second session on certain elements needed of further investigation; and
- To allow the trainer to modify, ammend, reformulate, make clear or change thetranscriptions of the first session.

This strategy has brought us some problems, as the reactions of people between interviews are different, also the second session has proved to be not so easy as the first one for he ‚individualization' of the areas of inquiry. Yet, we consider it a ‚experiment' worth it.

3. Third phase: researching vocational identities of trainees.

Here we are trying to use the information obtained in previous stages of the research in order to find out about the process of identity formation of young peopel with particular regard to the occupation they are training for. This is a complex area of inquiry because of certain developmental issues: the ages of most trainees implies that many of them are yet developing their identities in many regards, not only the occupational, and those should be taken into account.

Young people at these ages are involved in processes of exploration and developing trials when compromising with certain areas of their own identities. Furthermore, their own experience of work is probably a limited one, mediated through their own training in the SGS.

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Therefore it is important to find out about their views in different moments throughout their stay in the scheme, to consider the chance of changes happening as a result of the educational action. We are also considering the convenience of going back to these young people a few months after completion of the programme, to find out about more changes to have happened along that period.

Because these young people have suffered bad educational experiences with a record of failure, we will try to inquiry in all these areas of our interest in such a form which does not result ‚invasive' to them, to try and get their views in their own languages, something which is often ‚alien' to academic work (Cachón, 1999; Falcón, 2001; Feixa et al., 2002; García, 1994; Rodríguez, 2002). At the same time, we are trying to get this information which others among a group of youth which others did not reach (Toharia, 2001).

CONCLUDING REMARKS: METHODOLOGICAL PROBLEMS WE FACE.

> *Every narration is always a narration of something, of somehing which may be said, nevertheless, in many ways. Narration demands, in this sense, plurality and freedom of selection and election of diverse viewpoints. It is inherent to the essence of narration that there are variations to it. By this element of freedom, narration is the opposite to a documentary. This freedom that allows to narrate is not a mere arbitrarity, but a demand which comes from the listener. Because this one, as 'other', is important for that who tells, for the narration itself, it is in her interest that the narrator communicates with her. Communicates and makes her take part making her be part of the narration inviting her –or provoking her- to interpret it.*
>
> (Bárcena and Mélich, 2000, p. 122).

The definition and understanding of vocational identities is not the same in both projects. This is possible by the differences in methodologies and scope chosen by each team. There are different readings at the background of each team –despite there are commonalities too-. Furthermore, because we are developing empirical work in both projects, the understanding of vocational identities is linked to the biographies of people studied as well as by the vocations and professions chosen. There are also certain biases in both projects: country, academic, ideological and methodological, and these have shown up in the fieldwork.

And there are certain elements which should require further study, like the relations of vocational identities to work performance or to family life, issues which have not been explored in neither project. We have rather focused upon people's expectations and

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retrospective views on their working life. The study of vocational identity implies always relational processes which we have tried to capture while, at the same time, trying to avoid strict biographical approaches.

Through the use of qualitative methodologies we have tried to develop hypothesis arising from conceptual work as well as from empirical work. In the process of gathering data in the fieldwork we have encountered certain difficulties having access to the people and the information, also inner debates in the research teams regarding the selection of tools and the criteria to get the sample: is it any better that the units are individuals or groups/collectives? How are we devising professional communities? What is the role of organizational units –or institutions? The units will serve then as the cases submitted to comparison, also as the contexts in which we will look for areas of inquiry to compare with other units. In the end, the key question is the following: Is there a social category behind vocational identities?

'Narrative identity, belongs it to a person or a community, is the space between history and fiction. Human lifes are more legible when they are interpreted according to stories that people read and tell about them' (Bárcena and Mélich, 2000, p. 118).

With the qualitative analysis, we intend in both projects to grasp people's positions and arguments -both their definitions and their views-. Yet, we have not been able to reach their practices in FAME, we will try to do so in IDELAB-. We are also trying to grasp the processes they are embedded in –changes, interpersonal relations- as well as the strategies they develop to face them –ther reactions and anticipations-.

In both projects, we are trying to develop provisional typologies of extracted or constructed types. We are working with discourse, so we may build typologies which show main discourse patterns. For instance, in the case of FAME, the types are tools for our analysis, not an exhaustive analyses in themselves: there may be more types, but those are the ones which have evolved from the interviews we have conducted in Spain. The situation is somewhat different when we combine these with the interviews run by our Czech partners, and our joint work with them has resulted in a relatively different typology.

A very ambitious aim, yet something we have attempted with our material, has consisted of developing a typical discourse pattern for employers, also for teachers and for students. In both projects, for we have looked for the views of different actors and with different tools, we are trying to search for congruence, triangulation and comparison among them.

,This necessary interdependence is described in a set of conversational metaphors. Simply by being other, the "other" challenges the "self": who are you? Then, replying to the

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demands of the social world, the self can demonstrate her "response-ability"; answering the questions of the social world, she can establish her own "author-ity.' (Casey, 1993, p. 23).

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Vocational identity and working conditions in the sector of tourism: The views of employers and employees.

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1. Introduction: the context of the tourism sector and the hotel sub-sector.

Tourism is a basic sector in Spanish's economy, providing 33,601 million Euros in 1999. It is an employment-generating sector whose direct participation in the overall national employment figures was 6.2% in 1997, or 780,425 people[1]. Besides, it is a growing sector, where there has been a constant growth in supply since 1995, especially in 3 to 5 star hotels. In this sense, it is also worth mentioning the growing internationalisation of large Spanish hotel companies.

If we look at the Valencian community area and more specifically at hotel sector companies, there was a turnover of 352.5 million euros with 9,981 jobs[2]. There were 500 hotels with 81,275 rooms in 2000. 40 of them were located in the Valencian city, which means 7,798 rooms, and over 90% of these were in the 29 hotels with 3 or more stars[3].

In order to give a general overview of the situation in the sector we highlight five challenges the sector is facing at the moment:

a) Adapt to changes in demand

This is a complex sector, with a heterogeneous supply that comprises a large range of products that are progressively renewed. Tastes are diverse, and this requires the provision of a wider range of products that reflect this diversity. Not only does this segmentation of supply make new demands on the sector but it also opens up new possibilities. Furthermore, a more demanding, aware and selective consumer is emerging, and therefore quality and personalised customer care have become key factors in the design of products and the way work is organised.

All of this means an increasing need for functional flexibility of the work force, as it has to adapt to a wider range of tasks and keep up-to-date. This however does not mean that there is not a marked division of labour.

b) Address the problem of seasonality

In spite of the changes that are starting to take place, which involve a wider spread of holiday periods, as well as new products aimed at different groups in the low season, demand is still concentrated in very specific periods..

Because of seasonality there is an average variation of 11% in the volume of the employed work force [4]. This dynamic shows that there are two clearly differentiated labour segments: a more stable primary segment, and a temporary, insecure secondary segment. It implies a lack of longer-term perspectives for workers who cannot plan a professional career, and situations as overstaffing in the low season or understaffing in the high season. Seasonality means important difficulties to face fixed costs and recouping investment

c) Overcome the business fragmentation

Small and medium-sized companies are predominant in the accommodation sub-sector. In 1997 only 10.7 of companies had more than 20 paid staff. However, if we look at hotels with gold stars we find 46% of the establishments had more than 20 staff [5]. Small companies have more and

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[1] INE: Encuesta de Población Activa, 1997.
[2] Valencian Institute of Statistics (IVE): Annual Statistics 2000.
[3] Valencian Tourism Agency. Tourism in the Valencian Community. 2000. Valencian Government Generalitat Valenciana.
[4] Group IOÉ, o.c. pp.32.
[5] INE: "Central Directory of Businesses. Statistical results, 1997" Volume I. Quoted by Group IOÉ, o.c. pp.24

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more difficulties since they have to work in an increasingly global market, in which continuous investments in infrastructure and personnel, as well as access to information and the capacity to make themselves known in the market are essential.

The potential of large companies to face these challenges makes them more competitive. That's why, in contrast with this fragmentation of the sector there is a growing importance of hotel chains and other forms of business concentration. In 1997 there were 80 hotel chains in Spain which comprised 20% of hotels, 41% of rooms and 36.5% of employment. And the tendency continues to grow as it implies greater competitive advantages such as the possibility of economies of scale, outsourcing of tasks (such as staff training and supply), better access to information, greater corporate visibility, etc.

d) Address job insecurity

A vital factor when attempting to address the challenge of quality is the need to deal with the bad working conditions that affect a large number of workers in the sector[6]. This involves questions related to seasonality rates, salaries, working hours, and the fact that the tourism sector is weak in terms of the presence of unions.

Temporary job in the catering sub sector is 13 points above the work force average[7]. This job insecurity mainly affects low level posts, while permanent jobs are more present in management and administration posts as well as middle level posts in catering and accommodation. In the Valencian Community we find 54,5% of temporary jobs in accommodation[8]. In this way human resources are used flexibly, and according to demand, but without the necessary social guarantees or resources that would facilitate the promotion of these workers. This all implies a lack of career perspectives for a large part of the workforce, increasing difficulties entering the job, and a large proportion of irregular work, with the attendant consequences in social terms and in terms of the quality of production in the sector.

Furthermore, wages per hour are 15% lower than the average wage in the overall economy.[9]. If we focus on the accommodation sub-sector the average levels improve this figure slightly [10]. As far as working hours are concerned, the average working day of waged hotel workers is more than the average working hours in the overall economy. As regards hotels 35% of the employees work over 40 hours a week, while it reaches 50% in boarding houses [11].

e) Qualifications

Factors such as the development of tourism-related qualifications in official vocational training, and the intensification of occupational and continuous training in the sector and the introduction of Tourism as a university qualification together made up a scenario with a lot of potential. Added to this is the recent creation and promotion, by Autonomous Community authorities, of specialised qualification centres, such as the Network of Tourist Development Centres of the Valencian Community.

However, these policies encountered a complex situation in the tourism sector due to the difficulties of the companies themselves; most of them are small, they cannot afford to allow employees to attend training courses and their mentality values experience more than training. Added to this were the difficulties that stemmed from the situation of many employees, especially those in less secure jobs (a lack of resources available to spend on training, the temporary nature of the work and a lack of perspectives which is a disincentive to the investment of time or money in training.) All these factors gave rise to a situation that was not favourable to the necessary development of a qualified work force.

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[6] CECS: "Employment and training in tourism"; in Spain, 1998. Fundación Encuentro. pp.248.

[7] CECS: "Employment and training ...", o.c. pp.273.

[8] IVE: Annual Statistics 2000. o.c. pp.339.

[9] INE: Survey of salaries in industry and service companies. Madrid, 1.997.

[10] CECS: "Employment and training ...", o.c. pp.267

[11] Encuesta de Población Activa (EPA). 2ª trim. 1.998. Quoted by CECS: "Employment and training ...", o.c. pp.269

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In general, there is a low level of qualification of workers except for reception and middle management workers and also little encouragement for training from employers. Training was left to public initiative, the businesses in the sector externalised the training costs, and put recruitment before internal training [12]. Furthermore, the reduction of internal promotion opportunities resulted in the disappearance of the "training for promotion" motive in many cases. Only large hotels, especially the ones that are part of large chains, offer opportunities for internal promotion, and design their own training programs.

2. Methodology.

Under the framework of the research project "Vocational identity, flexibility and mobility in the European labour market –HPSE-CT-1999-00042"our objective is to analyse the construction of vocational identities in some important and innovating sectors in Valencian context, as the case of tourism. We decided focusing our work in hotel companies, which are going on an interesting transformation process within the framing challenges we have explain. Specially, this can be found in 3 or more stars hotels, and that's why we decided focus them in our research. So, we are interested in future of the sector.

Although our research is conducted towards employees discourse analysis, we decided to get a contrasting view trough high managers or employers interviews. Our idea was looking for the influence of the formal company discourse over the workers ones. Then we made 10 focused interviews to 10 employers (6 male and 4 female).

We based the selection of the workers to be interviewed trying to focus on the companies in which employers had already been interviewed, in order to facilitate contrasting data. In the sector of tourism, only one out of the eight hotels in the sample of employees does not match the employers' sample: that means two out of thirty one interviews.

We have interviewed thirty one employees among hotels with a minimum of two stars. As a whole, the interviews took place in eight hotels, all of them located in Valencia or the surrounding area. The ages of the interviewees vary from 21 to 57, there are 14 women and 17 men. They are positioned in jobs for which, nowadays, there exist a recognized vocational qualification obtained either in initial VET or in university. We tried to cover all different departments in the hotel, in order to contrast discourses from different functional positions. We equally tried to look for employees with and without formal responsibilities.

Focused interviews (opened but with a guide) were made in order to get a discourse over the main issues defined as relevant in a preliminary phase. The interviews content has been analysed in a systematic and comprehensive way. This analysis starts from qualitative categories that were defined from the interviews discourse and some theoretical contributions[13]. The result was a series of key factors in the vocational identity discourse of the workers. This paper present six identity types conceptually constructed from these factors.

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[12] Group IOE, o.c. pp.60.

[13] Beck, U. (2000), *Un nuevo mundo feliz: la precariedad del trabajo en la era de la globalización*. Barcelona, Paidós.
Dubar, C. (1991), *La socialisation. Construction des identités sociales et professionnelles*. Paris, Armand Colin.
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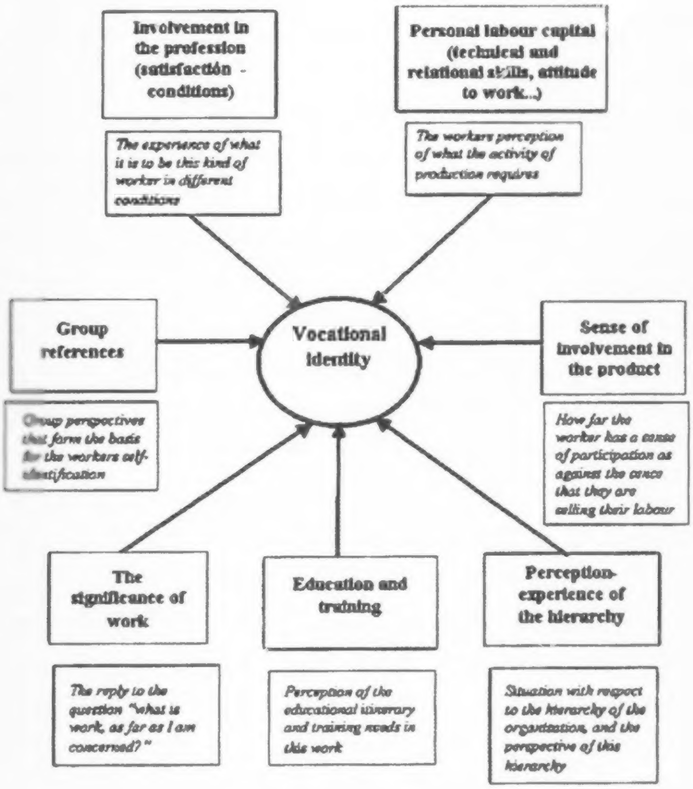
3. Key factors for a mapping of professional identity

The construction of a professional identity implies the interaction of various factors as experienced by each worker in his position within the production process and the organisation. These are questions that have to do with the worker's subjective involvement in the work, the objective conditions in which the work is done, with the worker's educational itinerary, with the worker's understanding of the job and the actions this implies, with relationships and groups to which the worker belongs. An analysis of the interviews has shown which factors are most relevant in the discourse of hotel workers and how these factors are formed.



Involvement in the profession (satisfactión - conditions)
The experience of what it is to be this kind of worker in different conditions
Personal labour capital (technical and relational skills, attitude to work...)
The workers perception of what the activity of production requires
Group references
Group perspectives that form the basis for the workers self-identification
Vocational identity
Sense of involvement in the product
How far the worker has a sense of participation as against the sence that they are selling their labour
The significance of work
The reply to the question "what is work, as far as I am concerned?"
Education and training
Perception of the educational itinerary and training needs in this work
Perception-experience of the hierarchy
Situation with respect to the hierarchy of the organisation, and the perspective of this hierarchy

Key factors for a mapping of professional identity

Our objective now is to identify, on the basis of the analysis, the principal discourse patterns that shape distinct basic types of professional identity. We have defined five types of discourse on a qualitative basis, using the factors mentioned. These types should be understood as "pure types", which serve as tools for analysis. They are not intended as an exhaustive typology of identity; rather they constitute a basic definition of types that allows us to organise the most relevant factors that appeared in the interviews. The five types are the "professional", the "technician/bureaucrat", the "customer service worker", the "trade worker" and the "newcomer / unconsolidated worker". Lastly, we have also defined a sixth discourse pattern, using the employer's interviews, which is an interesting contrast element.

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a) The professional.

This type is defined by a strong professional identity, in which we found aspects as autonomy, a corporate sense of the profession, self-development in a job with an important vocational component, and an awareness of one's value -as human capital- to the company. It is present among workers in positions of responsibility and considerable experience.

1. Involvement in the profession (stability/satisfaction).

These are workers with a permanent contract with the company, though there is a high incidence of workers changing companies in order to gain promotion. This is based on awareness of the value of one's own experience and training as "high performance" human capital, as well as an understanding of work as a vocation. The search for conditions in which one can fully develop one's professional capacity is more important than stability. On the other hand, there is no satisfaction with the recognition of the sacrifices and the working conditions. As regards working hours this type is characterised by a high level of availability that can be borne thanks to the vocational nature of the work. Lastly, polyvalence is seen as a key to professional behaviour, and an important element for promotion.

2. The Significance of Work.

The "professional" type exhibits a high level of job satisfaction, and the key to this is the vocational nature of the work. Work is seen as part of personal development, and is linked to the idea of the value of one's personal potential. The experience of work as an opportunity to show "what you have within in you" is linked with the idea of creativity, and a conception of work as "art". It is also worth pointing out that there is a discourse that refers to the "contribution to the common effort" among those in positions of responsibility.

3. Group References

References to the particular professional group of the worker are relevant here (groups, persons or the "profession" as an ideal construct). Links to this group are basically informal rather than formal. Another aspect in this type is a lack of connection with the organisation (in the sense of corporate identification).

4. Personal labour capital

The worker of this type has a large amount of specialised knowledge. It is relevant to know the sector and keep up-to-date with new techniques. It is also necessary to have a capacity for organisation and planning, since often the worker aspires to positions of responsibility. As regards relational skills, it is remarkable the capacity for leadership. A professional's attitude to work should not be limited to simply completing the task; rather it should be lived in order to produce quality work. Dedication, capacity for decision-making, imagination and creativity are key factors in a professional attitude.

5. Perception of the Hierarchy

In this type participation in the hierarchy is linked to professional development. The hierarchy is therefore respected both as part of the professional corporate culture, and because it is a personal goal. However the position of responsibility is also seen as implying the appearance of complications, because it presupposes time spent on aspects of management and human resources, which are not tasks for which there is a special vocation within the profession. It is emphasised that the function of responsibility involves recognising work done, as much as making demands and supervising. As regards relationships with superiors, they are understood as involving cooperation to ensure the success of the work.

6. Sense of involvement in the product

The professional takes part in a process in which his own potential is at stake, and to which he must contribute with personal initiative. Autonomy –which increases with experience-reinforces the sense of being a professional. There is also awareness of forming part of a whole coexists with the idea that one has one's own field, in which no one from outside the profession should interfere.

7. Education and training

This worker sees experience as more relevant than training, in spite of the fact that more importance is being given to training. But the workers do not consider themselves professionals until they have undergone a learning process in the daily practice of real work; It involves the creation of ones own way of working and the readjustment of basic knowledge acquired in official training. Reference is made to the apprenticeship model of learning as a basis for professional practice. As regards continuous training, it is accepted as important for the purposes of keeping up-to-date. But participants are generally those workers who are still consolidating their professional status. Fully-fledged professionals keep up-to-date they by other means (fairs, congresses, meetings) and see it more as sharing knowledge with peers. Only professionals in hotel chains do participate in internal courses on relations and corporate dynamics.

b) The technician/bureaucrat with access to responsibility

This type is defined by a strong professional identity, centred on the organisation as a functional structure for work, which appears in workers involved in administrative management with responsibility (intermediate levels) or with expectations of early promotion. It appears especially frequently in large companies and hotel chains

1. Involvement in the profession (stability/satisfaction).

This worker has a stable situation with a permanent contract and expects usually to remain within the company and follow a career there. There are opportunities to gain promotion, though this may involve changing hotel –within the chain-. Knowledge of the company is a key factor in developing a career, as well as being good at one's job. As regards the promotion criteria used for planning a career the discourse emphasises the importance of "a positive evaluation of the work by the company" together with personal initiative, without much emphasis on whether formal criteria exist. As regards job satisfaction, they value the type of work done, as well as the experience of responsibility, although it is felt that there is not sufficient recognition by the company.

2. The Significance of Work

It is centred on the idea of contribution to the common endeavour that is the company. Emphasis is given to a sense of teamwork and a view of one's own work in the context of the organisation, with which the worker identifies strongly. This is complemented by an understanding of work as a medium for personal progress, which is seen as a step up the ladder, accompanied by recognition on the part of the company, as well as the practice of one's own knowledge.

3. Group References

The discourse of this type of worker exhibits a group reference model which could be characterised as a "community" model, centred on the company, and the community of interest that includes workers and managers, and implies motivation to make a common effort to ensure the success of the company, with increasing involvement as they ascend in the hierarchy. Other relevant aspects are the importance given to teamwork, and to the functional responsibility of each individual for the collective group; the individualisation of company-worker communication systems, always mediated through formal hierarchical channels; the deactivation of the corporate labour discourse; and the existence of intense socialisation processes, more formalised the larger the company is.

4. Personal labour capital

This type of worker emphasises the capacity for organisation and planning, together with the technical knowledge related to his speciality. Moreover this worker has a more elaborate global discourse relating to the tourist sector and is aware of developments. Of especial importance are the capacity to manage human resources, and leadership skills, as well as an attitude of effort, responsibility and the capacity to take decisions in unexpected situations.

5. Perception of the Hierarchy

This type of worker is part of the hierarchy at intermediate level. This gives rise to a relationship of functional trust with superiors, while with subordinates there is a tension between control and closeness. Participation in the structure is the key to identity. There are different types of leadership that are found in varying combinations: paternalist (functional trust and recognition), authoritarian (distrust, pressure and control) and democratic (listening-dialogue and participative organisation) though the first two predominate in the discourse.

6. Sense of involvement in the product

Forming part of the hierarchy for them implies feeling more involved in the production process. Taking on responsibilities within the company is seen furthermore as an accumulation of problems. Even so the discourse regarding the implications of responsibility is still positive, because one is contributing to the success of the company, as in terms of the increased opportunities to develop one's own career. This type of worker has a strong sense of autonomy, specially in the ambit of the department. There is an awareness of forming part of a whole at work. But the separateness of departments is superimposed on that perception, and it is emphasised that each one stay within his area.

7. Education and training

This is a worker with specialist qualifications, who values a strong theoretical and technical base, which furthermore should always be kept up-to-date. Emphasis is given to the importance of qualifications for access to an increasingly competitive and formalised labour market. But experience is what allows one to adapt this initial basic knowledge to the peculiarities of each job and each company. The evolution of a career in the company should combine good technical knowledge with practical experience that allows the worker to adapt efficiently within the organisation. Continuous training initiatives are increasingly organised by the large companies themselves. They tend to focus on technical innovations, but above all on questions of human resources management, leadership strategies and aspects of the organisational culture, and they constitute an important tool for the socialisation of managers by the organisation. There are difficulties in attending continuous training courses, given the time availability required. Furthermore, their interest in a career within the company leads these workers to give priority to internal training rather than external opportunities.

c) The customer service worker

This professional identity is focused on work with direct customer service, in which relations with people are the key to the significance of the work. The level of integration tends to be strong, although this depends to a large extent on the stability afforded by the company.

1. Involvement in the profession (stability/satisfaction).

Stability is important for this type of worker, since it determines the level of identification with the company, which means that customer service is framed within the organisational identity. Their experience of working combines satisfaction with the type of tasks and dissatisfaction with the salary and with working conditions. There is not a large degree of openness to change. However the diversity of customers implies a constant need to adapt, and this lack of routine is viewed as satisfactory. Promotion opportunities involve moving up within the department or transfer to an administrative department. This internal mobility is difficult. That's why moving to other hotels in the chain is seen as a possible route. Moreover the possibility of promotion depends very much on the evaluation made by the company, rather than formalised criteria.

2. The Significance of Work.

The significance of work is situated in the service relationship with customers and their recognition of this service. A job well done implies anticipating the customers needs, so that the result is the customer's well being. The functions require the worker to be "in the front line", so that they are the "face of the hotel". The discourse is of vocation for service based on the corporate identity. Another emphasis is on teamwork: the idea that all have their role in the common effort to ensure the company's success. We find a perception of the central nature of their role for the functioning of the whole.

3. Group References

Basically, this type shares the community reference. Workers identificate themselves as "the face the company shows to the client", and that requires that the worker has assimilated the company culture. The sense of group identification with colleagues is based on the functional team relationships within the department and not on mutual support in opposition to the company (the worker collective is fragmented and identity is dissolved in the company community). The discourse of the "internal client" is important (regarding care of other members of the organisation) and it is linked to the quality of work and competitiveness.

4. Personal labour capital

The most important skills are relational ones: as skills that have to do with appropriate behaviour, as the capacity to deal with the customer according to his characteristics and expectations. All of this refers to an attitude to service that means a personal involvement in the custom's well-being. Other attitudes like dedication and effort are important. As regard technical knowledge, the most important are languages, and computers, especially of specific software used in the job, as well as the use of Internet.

5. Perception of the Hierarchy

From the worker's point of view the middle management are seen as close in terms of relations, as long as respect is maintained for hierarchy. Relations are considered to be good, and useful to do one's job better. Leadership and fluid communications with the workers in the team are valued. Direct superiors are asked for doubts, even labour–related ones, rather than union representatives or colleagues. As regards higher levels of the hierarchy they are viewed as distant since contact is through formal channels.

6. Sense of involvement in the product.

This worker feels that he has a vital role: the satisfaction of the customer, which is a central objective of the hotel. They see themselves as having sufficient autonomy to do the job, framed within the limits defined by superiors to whom they have to report. This perception of autonomy affects the identity, reinforcing self-confidence. But some matters which can affect anxiety levels at work: a lack of clear criteria for action, indeterminate guidelines and objectives on the part of the organisation and a lack of feedback on the work done. This type of worker values good organisation and distribution of the work, which eliminates uncertainty. It is the existence of clear guidelines, more than supervision, which creates a framework to the autonomy.

7. Education and training

Learning through experience is valued, especially by older staff. This gives security, "know-how" and knowledge of the workplace and its real needs. However, more importance is given to specific training, which gives access to a knowledge base in a systematic way with fewer errors. Experience later modifies this base, first through placements, and then when they start to work. In any case, there is a perception that training is still a long way from company realities. Continuous training programmes are still not used much, except in cases where the company itself provides them. The commonest types of courses are languages, computers and customer service. Similarly, companies foster participation in courses that are centred on aspects of the organisational culture, with the aim of promoting identification with the company and its style.

d) The trade worker

This is a type of professional identity centred on specialist manual work, which implies the acquisition of knowledge of a trade (with a learning process and a progressive development in terms of practice and responsibilities: from apprentice to leader of a team or area). Professional identity is centred on the idea of work itself as a value.

1. Involvement in the profession (stability/satisfaction).

The integration of this type of worker is due to the assimilation of the value of work, experienced from the point of view of taking up a trade as one's own. Assimilation, for the "trade worker", requires a minimum level of experience in that trade. A factor contributing to dissatisfaction is the length of working hours due to the accumulation of extra tasks. The demand for this availability is justified by an "ethic of work and common effort", which produces a low opinion of those who negotiate their availability. This becomes a criterion for evaluation of the worker. Discourse relating to the keys to promotion in the organisation is centred on "personal effort", the value of work and the successful execution of the work. Although these workers are not especially well disposed to change, there is also the view that if change is required by the job it has to be accepted without question. This leads to the need for organisation, planning and forecasting as keys to quality work that help to eliminate uncertainty.

2. The Significance of Work.

The key issue as regards significance is the value of work of itself. The indications are that one has to work, and the job one does is as good as any other, or at least it is the option available right now. The most important is execution of one's functions, as well as the value of a job well done. The discourse, then, is one of "interiorised obligation", not from a vocational point of view, rather from the perspective of a "work ethic" which acts as the key to motivation. This importance given to work is linked to the value of the result as the key to satisfaction: the focus is centred on efficiency and organisation.

3. Group References

This type is also imbued with the community atmosphere of the company. This gives rise to a strong sense of belonging, with a heavily affective tone especially among "lifelong" workers. This participation in the organisational culture is focused on the question of teamwork and a common effort. In this effort the company is seen as an "aseptic" witness of the effort of the worker and the execution of the tasks. The process of socialisation makes it clear that the work is one's own responsibility. The relations with colleagues are centred on the work and are guided by the channels established for the purpose. There is a perception of group fragmentation, which implies dissolution of the worker collective in the company community (labour matters are dealt individually with superiors).

4. Personal labour capital

Together with the technical knowledge and specialist skills of the trade, which are heavily based on progressive practical experience, the type of requirements these workers place most emphasis on, are refer to effort, responsibility and good professional practice: work capacity, successful execution of tasks, punctuality, hygiene, order, seriousness and efficiency in the carrying out of ones functions, following the procedures and norms of the organisation, a desire to learn and improve etc. All of this is key to quality work.

5. Perception of the Hierarchy

Relations with the hierarchy are centred on the workers functions and on the establishment of control and supervision mechanisms: a manager expect the workers to fulfil their obligations and do their work without creating problems. The role of the managers as those responsible for the work and its organisation implies also a confidence in their professional capacity, since they are seen as workers who are proficient in the trade and this is why they have been given responsibility.

6. Sense of involvement in the product

The workers have autonomy as regards their own tasks, which constitute the area they understand. This gives a sense of "having a trade", although one always works within guidelines established by the managers. The result is what matters. To facilitate this autonomy it is considered important that tasks are well organised by the person in charge of the area, which eliminates uncertainty. It is important that the people in charge of an area, who know the trade, set these guidelines, since management by a superior who "doesn't know the trade" may be an obstacle.

7. Education and training

The specialist technical knowledge of the trade is acquired through experience, and, increasingly, training. There is agreement that "work is what teaches the trade". Training provides the basic techniques and knowledge of the organisation of work. Placements are considered fundamental for learning the trade and acquiring minimal skill levels. Continuous training is seen as a means to keep ones knowledge up-to-date. There is a wide range of specific courses for each of the trades of the workers. Courses organised by the company place emphasis on the organisational culture and the particular needs of each job. However, few workers have attended these courses yet. Furthermore in cases of more routine jobs there is not the same perception of innovation at work, so that the courses are not seen as vital for work.

e) The "newcomer / unconsolidated" worker

This type of professional identity is common in young workers, with unstable work situations, and who change jobs frequently, and can therefore not develop a special link to the company. They are defining their own priorities with respect to the profession and learning at work and their main aim is to gain experience. They work to earn a living and get experience.

1. Involvement in the profession (stability/satisfaction).

This discourse is typical of an identity in transition, in the process of integration into work. The "temporary" nature of the work is considered "normal" from the perspective of workers who are just beginning in their profession. They value it – despite their dissatisfaction – as a strategic opportunity to accumulate experience. The experience of frequent changes of job implies taking on different functions. This is valued as positive for the itinerary of learning experiences, although an excessive fragmentation can make difficult the learning of the job. There is also a discourse of "changing jobs without promotion" which is common in temporary workers in hotels where there are no expectations of stability. They focus on finding another job when the current one ends. The emphasis is on "earning a living", but the salary is one of the factors that produce most dissatisfaction, especially when the conditions they have to accept are taken into account.

2. The Significance of Work

The most important refers to the experience of work as a way of earning a living and obtaining independence. The work activity itself is seen as "a job, no more than that", although it is preferred that it be related to the subject one has studied. Seen from this perspective, initiation into the world of work is not easy, and it requires time and experience. Even though the work is insecure it is valued as a learning experience that provides knowledge of the sector.

3. Group References

We can state that, for this type of worker, the group references fit a model referred to as "dispersed labour" which is characterised by a lack of group references, as much from the point of view of a sense of belonging in the company as in the sense of a lack of identification with the job itself, and, lastly, without any special identification with the collective of workers. A fast turnover of workers in the hotel creates serious difficulties with respect to group cohesion. Mutual support links between workers are fragmented, since there are no opportunities to establish minimally stable links, so that each acts according to his interests and expectations within the company.

4. Personal labour capital

What is required is the will to work and make an effort, because in practice one can learn what one does not know. The attitude is important: one must want to work, and do the work as required. It is also important to want to learn. There is an awareness that one is still at the start of a process of immersion in the world of work: the knowledge capital that the worker needs to make progress is still being accumulated.

5. Perception of the Hierarchy

The relationships with superiors directly related with the work are centred on the supervision of the task. Beyond this level contact is superficial and formal. There is a distance created by the hierarchical relationship, which involves a combination of respect and indifference. In any case, while the worker is in the company, the immediate superior constitutes the formal channel for relations with the management. Any matter which refers to working conditions has to be dealt with through this channel.

6. Sense of involvement in the product

The level of involvement of this type of worker is limited. As the expectations that the worker will be changing companies rise, the level of personal involvement drops. Basically, the temporary nature of the job implies little motivation to look for additional responsibilities. There is little autonomy: the tasks that have been assigned are the worker's responsibility, but the experience is of strict supervision of the work.

7. Education and training

These workers emphasise the importance of the practical knowledge of the job that has been acquired through official vocational training, although this is sometimes described as distant from real work, which is why there is a lot of interest in work placements. But more importance is given to the learning that is acquired through varied experience in a real job. As regards continuous training, workers of this type are not very willing to participate since work itself is a priority, as opposed to more study. Another question is the difficulty of fitting in a flexible way periods of unemployment, to the calendars of courses, which is a barrier for those who are in unstable situations.

f) The worker in the employer's discourse.

The discourse shows a worker defined by satisfaction with the job well done, an up to date technical knowledge and a vocational sense of the work. He is interesting in training to progress in the profession. And he has a deep identification with the company and understands responsibility of each function for the collective organization, from his own role to manager's ones.

1. Involvement in the profession (stability/satisfaction).

This type of worker has good working conditions (permanent contract and a good salary) that promote his loyalty to the company. To the extent that the worker is a commitment employee, he will be reward with better working conditions and the possibility of promotional mobility and training according his own interest. This all shown as compensation system to get the worker's interest, without talking about company's benefits in it, not even the arbitrary nature than means the lack of formalised criteria. Similarly, the importance of temporary work and bad conditions working in the own company is underestimate.

2. The Significance of Work

The most important attitude in a worker is feeling proud of a "job-well-done". This is why employers place special emphasis on the need for workers to have a vocation for the job. This vocation guarantees a key factor towards effort and quality. It's a vocational approach that goes over technical work, that is, in any case, also important.

3. Group References

Discourse shows a "fusion" or "community" model of group reference. It means a comprehension of the company as a whole, in which each part is important to the achievement of the company's objectives, since the sense of involvement is collective and shared by all employees. Workers are expected to identify with the hotel they belong to. There is a strong corporate identity, and company goals appeared as collective goals, even worker's. From this view, personal identity is linked with company identity. That's why the need of promote employees loyalty appears as an important objective.

4. Personal labour capital

The discourse appoints new job profiles that emphasise the use of information technologies and languages, as well as customer relation skills. These three issues seems transversal to most of the hotels departments, and are conforming the companies' training programs. The most important social skills are communication, teamwork, and the ability to be assertive. A vocation and a professional attitude to work appear in the discourse as key elements.

5. Perception of the Hierarchy

The discourse shows a functional understanding of hierarchy, within the community model: all the roles are relevant, playing their own functions for the global organization. That's why hierarchy is necessary. It's very important the department organization, and the role that intermediate managers plays in it. This allows an autonomy work within company guidelines. These managers must be trust persons, which share the culture and objectives of the company, and experimented professionals –rather than graduated ones-. Manager team appears as coordinated working guarantee in the global organization.

6. Sense of involvement in the product

This worker is strongly commitment with his job, having awareness of being part of a collective effort. Company objectives are assumed as the worker's own goals. This makes him felt to be working for his own interest. In intermediate managers cases also exist an autonomy level that needs a strong personal commitment.

7. Education and training

Experience is a more valued factor than training, as a guarantee of professional behaviour. The importance given to formal professional training depends of the post in the organization and the kind of job. As regards to continuous professional training, it seems relevant because of the changes in sector. It permits facing as well company production needs, as much worker promotion and career possibilities –which is seen as a worker's own interest use of company-.

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VOCATIONAL IDENTITIES IN THE SECTOR OF TOURISM

VOCATIONAL IDENTITY, FLEXIBILITY AND MOBILITY IN THE EUROPEAN LABOUR MARKET

5TH FP
HPSE-CT-1999-00042

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VOCATIONAL IDENTITIES IN THE SECTOR OF TOURISM

- Discourses of employees, employers, teachers and students
  - Different research tools
- Search for interactions among the different actors
  - Some failed attempt
- Sources for identifying a collective identitity
- How they perceive challenges in the sector, how they face them, what expectations are raised

Tourism sector in Spain

- Tourism is a basic sector in Spanish economy, providing 33,601 million Euros in 1999.
- It is an employment-generating sector with a direct participation in the overall national employment figures of 6.2% in 1997.
- It is a growing sector, specially in 3 to 5 star hotels.
- Hotel sector in Valencian Community:
  - 352.5 million euros, with 9,981 jobs (1996).
  - Recent growth in Valencia City (3 or more stars hotels).

Main challenges in tourism sector (1)

a) Adapt to changes in demand
  - Heterogeneous demand and segmentation of supply
  - More demanding, aware and selective consumer
  - Increasing need for functional flexibility of the workforce and organizations.

b) Address the problem of seasonality
  - Emerging changes in concentrating demand periods
  - Seasonality consequences:
    - temporary and insecure secondary labour segment
    - lack of longer-term perspectives for workers
    - Excess of staff and lack of staff
    - difficulties to face fixed costs and recouping investment

Main challenges in tourism sector (2)

c) Overcome the business fragmentation

- Small and medium-sized companies are predominant (1997: 54% of hotels had less than 20 paid staff).
- Growing importance of hotel chains and other forms of business concentration (1997: 80 hotel chains in Spain)
- Competitive advantages: economies of scale, outsourcing of tasks, access to information, greater corporate visibility, etc.

d) Addres job insecurity

- High level of temporary job, mainly affects low level posts (54% in VC)
- Flexibility in personal management, according to demand, but without social guarantees
- Consequences: lack of career perspectives, difficulties entering the job and training, irregular work, lower quality of production
- Low salaries and accumulation of extra working hours (35% of hotel workers: more than 40 hours a week)
- Weakness in terms of the presence of unions

Main challenges in tourism sector (3)

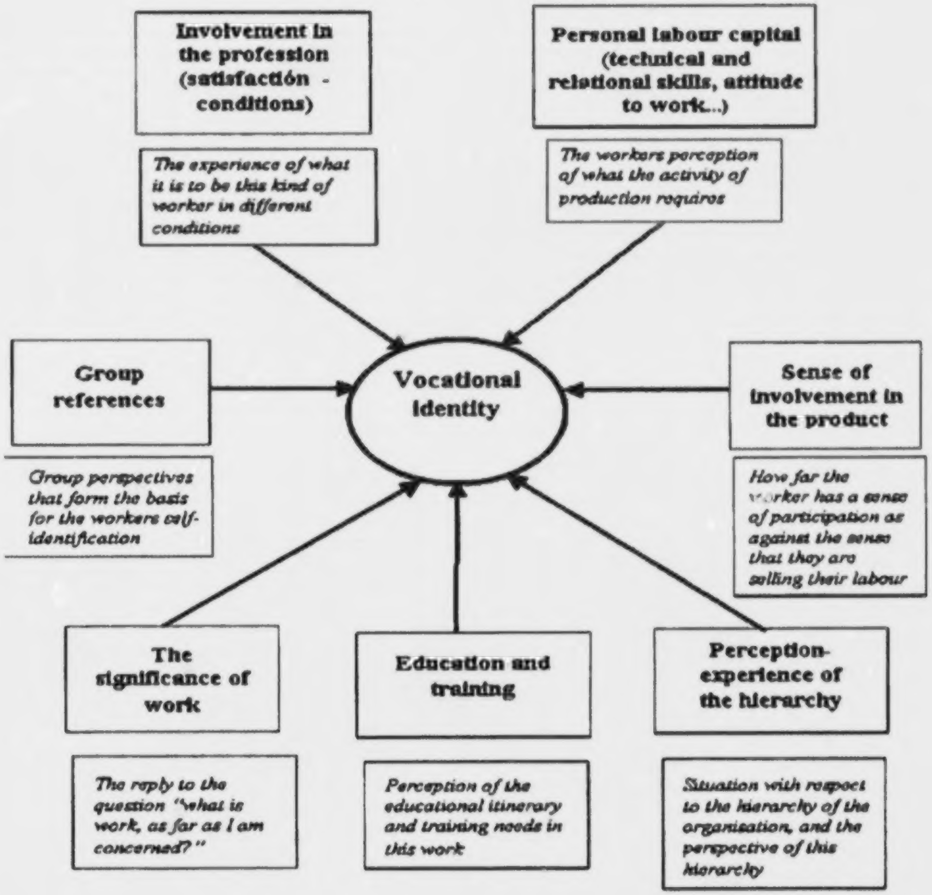
e) Qualifications

- New training options in tourism: official vocational training, occupational and continuous training and university degrees
- Specialised qualification centres (Autonomous Community government)
- Low level of qualification of workers and little encouragement for training from employers
- Difficulties of small companies (cost, time and mentality)
- Workers difficulties (lack of resources, high dedication –hours- to work, and lack of perspectives)
- Emerging changes in large hotels (their own training programs)

Methodology

- "Vocational identity, flexibility and mobility in the European labour market"
- Objective: to analyse the construction of vocational identities in some important and innovating sectors in VC
- Focus: 10 hotel companies in Valencia city, (2 or more stars)
- 10 focused interviews to employers
- 31 focused interviews to employees
- Focused interviews (open but with a guide)
- Systematic-comprehensive analysis from qualitative categories (from the interviews discourse and theoretical contributions)
- Definition of key factors in vocational identity discourses
- Identify the discourse patterns that shape basic types of professional identity

Key factors for a mapping of professional identity



Involvement in the profession (satisfactión - conditions)

The experience of what it is to be this kind of worker in different conditions

Personal labour capital (technical and relational skills, attitude to work...)

The workers perception of what the activity of production requires

Group references

Group perspectives that form the basis for the workers self-identification

Vocational identity

Sense of involvement in the product

How far the worker has a sense of participation as against the sense that they are selling their labour

The significance of work

The reply to the question "what is work, as far as I am concerned?"

Education and training

Perception of the educational itinerary and training needs in this work

Perception-experience of the hierarchy

Situation with respect to the hierarchy of the organisation, and the perspective of this hierarchy

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The “professional” (1)

1. Involvement in the profession (stability/satisfaction).
    - High level of job satisfaction and strong professional integration (vocation and. “high performance” human capital: experience/training).
    - External mobility in order to develop professional career
    - High level of availability and polyvalence (as keys to professional and vocational behaviour and for promotion)
2. The Significance of Work.
    - Work as a vocation and part of personal development.
    - Creativity: conceiving work as “art”
    - Contribution to the company common endeavour with one’s human capital
3. Group references.
    - References to his professional group (groups, persons or the “profession” as an ideal construct): formal/informal links
    - Lack of corporate identification with the organisation

The “professional” (2)

4. Personal labour capital
    - Human capital makes his identity distinctive and valuable to the company
    - Specialization (knowledge of the sector, new techniques and know-how)
    - Leadership and capacity for organisation, decision-making and planning
    - Attitudes: Dedication, ambition, imagination and creativity
5. Perception of the hierarchy
    - Participation in the hierarchy is linked to professional development (part of the professional corporate culture and a personal goal).
    - Complications: management and supervision of human resources
    - Responsibility: recognising work done, making demands and supervising
    - Relationships with superiors: cooperation to ensure the success of the work

The “professional” (3)

6. Sense of involvement in the product
   - Autonomy–which increases with experience-reinforces the sense of being a professional
   - Challenge to his own potential
   - Perception of forming part of a whole / professional has his own field
7. Education and training
   - Learning process in the daily practice of real work
   - Increasing importance is being given to training: (far from real work)
   - Apprenticeship model of learning as a basis for professional practice
   - Continuous training: a way for keeping up-to-date (young professionals)
   - Fully-fledged professionals: keep up-to-date sharing knowledge with peers
   - Professionals in hotel chains: internal courses on corporate dynamics

The “technician/bureaucrat” (1)

1. Involvement in the profession (stability/satisfaction).
    - Stable situation and expectation to follow a career within the company
    - Keys for promotion: technical knowledge, polyvalence and knowing the company and its culture
    - Lack of formal criteria for promotion (evaluation by the manager)
    - Satisfaction with the type of work and the experience of responsibility (but there is no recognition by the company)
2. The Significance of Work.
    - Work as contribution to the common endeavour that is the company: sense of teamwork and global view of the work
    - Work as a medium for personal progress (step up the ladder) and recognition on the part of the company
    - Work as the practice of one’s own knowledge

The “technician/bureaucrat” (2)

3. Group references: “Community” model.

- Identification with the company: community of interest (workers and managers)
- Importance given to teamwork, and to the functional responsibility of each individual for the collective group
- Deactivation of the corporate labour discourse and individualisation of company-worker communication systems
- Existence of intense and formal socialisation processes

4. Personal labour capital

- Leadership skills, organisation and planning capacity and technical knowledge
- Attitude of effort, responsibility and the capacity to take decisions
- Global discourse relating to the tourist sector

5. Perception of the hierarchy

- Participation in the the hierarchy at intermediate level is the key to identity
- Relationship of functional trust with superiors
- Combination of paternalist and authoritarian leadership (tension between control and closeness with subordinates)

The “technician/bureaucrat” (3)

6. Sense of involvement in the product

- Forming part of the hierarchy: feeling more involved in the production process
- Responsibilities as accumulation of problems vs. opportunities
- Sense of autonomy within the limits of the department vs. awareness of forming part of a whole at work

7. Education and training

- Specialist qualifications (strong theoretical and technical base)
- Experience: adapt initial basic knowledge to each job and each company
- Career in the company: technical knowledge and experience to adapt efficiently within the organisation
- Continuous training: increasing value, but difficulties in attending (time availability)
- Priority to internal training (interest in a career within the company)
- Focus on technical innovations, human resources management, leadership strategies and aspects of the organisational culture

The “customer service worker” (1)

1. Involvement in the profession (stability/satisfaction).

- Stability: level of integration and identification with the company
- Satisfaction with the type of tasks and dissatisfaction with working conditions
- Difficult internal mobility (career: moving to other hotels in the chain)

2. The Significance of Work.

- Significance of work: the service relationship with customers and their recognition of this service (the customer’s well being as objetive)
- The ”face of the hotel”: vocation for service based on the corporate identity
- Central position of his role in the common effort to ensure the company’s success

3. Group references.

- Community reference as “the face the company shows to the client”
- Collective identity as workers: dissolved in the company community (only functional team relationships)
- Discourse of the “internal client”: care of members of the organisation

The “customer service worker” (2)

4. Personal labour capital
    - Relational skills: appropriate behaviour, as the capacity to deal with the customer according to his characteristics and expectations.
    - Technical knowledge: languages and computers (specific software and internet)
    - Attitudes: Dedication and effort
5. Perception of the hierarchy
    - Middle management: close relations and respect for hierarchy
    - Good and functional for working relations (communication and control)
    - Direct superiors are asked for advice, rather than union representatives or colleagues
    - Higher levels of the hierarchy: distant (contact is through formal channels)

The “customer service worker” (3)

6. Sense of involvement in the product
    - Autonomy at work affects the identity, reinforcing self-confidence
    - Matters which can affect anxiety levels at work: a lack of clear objectives, guidelines and criteria for action and a lack of feedback on the work done
    - Clear guidelines, more than supervision, creates a framework to the autonomy
7. Education and training
    - Specific training: a knowledge base in a systematic way with fewer errors (far from company realities: importance of placements)
    - Experience: gives security, “know-how” and knowledge of the workplace and its real needs
    - Continuous training programmes: seldom used (only internal courses).
    - Contents: languages, computers, customer service and organisational culture

The "trade worker" (1)

1. Involvement in the profession (stability/satisfaction).
   - Assimilation of the value of work, experienced from the point of view of taking up a trade as one's own
   - Requires a minimum level of experience in that trade
   - Dissatisfaction because of accumulation of extra tasks. Demand for availability justified by an "ethic of work and common effort"
   - "Personal effort" and efficiency as keys to promotion
   - Need for organisation, planning and forecasting as keys to quality work
2. The Significance of Work.
   - Value of work by itself: performance of one's functions and a job well done.
   - Discourse of "interiorised obligation", from a "work ethic" perspective which acts as the key to motivation.
   - Value of the result as the key to satisfaction (efficiency and organisation)

The “trade worker” (2)

3. Group references:
   - Community model: strong sense of belonging with a heavily affective tone
   - Participation in the organisational culture: teamwork and common effort
   - Relations with colleagues: work centred and guided by formal channels
   - Group fragmentation and dissolution of the worker collective in the company community (labour matters are dealt individually with superiors)
4. Personal labour capital
   - Technical knowledge and specialist skills of the trade, based on progressive practical experience
   - Effort, responsibility, work capacity, successful execution of tasks, order, seriousness and efficiency, following the norms, and a desire to improve.
5. Perception of the hierarchy
   - Establishment of control and supervision mechanisms: discipline and working without creating problems
   - Manager as a worker who is proficient in the trade

The “trade worker” (3)

6. Sense of involvement in the product
    - Autonomy in the area they understand (sense of “having a trade”)
    - the result is what matters: a work well done supervised by the superiors
    - Tasks must be well organised by the area manager (who knows the trade) which eliminates uncertainty
7. Education and training
    - Specialist technical knowledge of the trade is acquired through experience
    - Training (specially placements) provides the basic techniques and knowledge, although they are seen as deficient
    - Continuous training is seen as a means to keep ones knowledge up-to-date, but few workers have attended it.
    - Participation increase in courses organised by the company of the worker (organisational culture and the particular needs of each job)
    - In more routine jobs, courses are not seen as vital for work.

The “newcomer / unconsolidated worker”(1)

1.Involvement in the profession (stability/satisfaction).
- Identity in transition, in the process of integration into work
- Temporary work is considered –despite their dissatisfaction– as a normal strategic opportunity to accumulate experience
- Frequent changes of job are valued as learning experiences (but fragmentation can difficult the learning of the job)
- Low satisfaction with salary and work conditions
- Changing jobs without promotion: finding another job when the current one ends

2.The Significance of Work.
- Work as a way of earning a living and obtaining independence
- The work activity seen as “a job, no more than that” (but preferred to be related to the subject one has studied)
- Work as a learning experience that provides knowledge of the sector.

The “newcomer / unconsolidated worker” (2)

3. Group references:
    - Dispersed labour model: lack of group references (no sense of belonging in the company, no identification with the job and the collective of workers)
    - Fast turnover of workers: difficulties with respect to group cohesion
    - Mutual support links between workers are fragmented, so that each one acts according to his interests and expectations within the company.
4. Personal labour capital
    - The knowledge capital that the worker needs is still being accumulated.
    - What is required is the will to learn, to work and to make an effort, because in practice one can learn what one does not know
5. Perception of the hierarchy
    - Relationships centred on instructions, supervision of the work, and reporting the results. Contact is functional, superficial, correct and formal.
    - The immediate superior: formal channel for relations with the management for any matter with working conditions

The “newcomer / unconsolidated worker” (3)

6. Sense of involvement in the product
   - As the expectations of changing companies rise, the level of personal involvement drops
   - Limited to fulfilling the requirements of the post without looking for additional responsibilities
   - Little autonomy: experience of strict supervision of the work
7. Education and training
   - Importance of the practical knowledge of the job acquired through official vocational training (but distant from real work). Interest in placements.
   - Increasing value of learning acquired through varied experience in a real job
   - Difficulties and low motivation for continuous training (orientation to work)
   - Difficulty of fitting periods of unemployment to the calendars of courses

The worker in the employer’s discourse (1)

1.Involvement in the profession (stability/satisfaction).

- Satisfaction with the job, technical knowledge and a vocational sense of the work
- Good working conditions that promote his loyalty to the company.
- Possibility of promotional mobility and training according to his own interest.
- Importance of temporary work, arbitrary of promotion criteria and bad conditions working is underestimate.

2.The Significance of Work.

- Feeling proud of a “job-well-done” as a key factor towards quality
- Personal satisfaction with a vocational work

3.Group references.

- Community model: strong corporate identity linked with personal identity
- Need of a stable worker identify with the company and commitment with his objectives, feeling that he is working for his own future and interests

The worker in the employer's discourse (2)

4. Personal labour capital
   - Technical knowledge: use of information technologies, languages and customer relation skills.
   - Value of vocation, ambition, professional attitude to work, communication and teamwork and satisfaction with a job well done.
5. Perception of the hierarchy
   - Functional understanding of hierarchy: all the roles are relevant, playing their own functions for the global organization
   - Manager team appears as coordinated working guarantee in the global organization
   - Intermediate managers must be trusted persons, which share the culture and objectives of the company, and experimented professionals

The worker in the employer’s discourse (3)

6. Sense of involvement in the product

- This worker is strongly committed with his job, having awareness of being part of a collective effort
- Company objectives are assumed as the worker’s own goals (he feels like working for his own interest).
- In intermediate managers cases the autonomy level demands a strong personal commitment

7. Education and training

- Experience is a more valued factor than training, as a guarantee of professional behaviour
- The importance given to formal professional training depends of the post in the organization
- Continuous training seems relevant because it also allows facing company production needs, as well as worker promotion and career possibilities

TEACHERS' VIEWS

Teachers' views - Methodology

- Questionnaires sent to all 16 schools (12 public, 4 private) with formal VET in the sector
    - *THE SAMPLE*
- 49 responses from 13 schools, mainly public (approx. 25% of all teachers in the sector)
- 50% women
- 60% between 30 and 45 years old -in charge of placements
- 17 have MA, 13 a degree, 19 VET level 3
- 21 of them studied tourism (university or VET)

Teachers’ views – Inquiry assumptions

- Working as teachers, yet teaching students to become professionals in the sector of tourism
- What are their notions of work (their own and work on the sector) and what are the effects on the notions their students will develop
  - These might be based upon:
    - Career
    - Initial and continuing training
    - Working conditions
    - Their images of the profession (in teaching and tourism)

Teachers' views – Areas of inquiry

- Work trajectory
- Vocational call and vocational training
- Evaluation of the training in the sector
- Perception of the sector
- Relation of the training provided to labour market trends and needs
- Self-appraisal as teachers
- Career expectations
- Their views on 'good workers' in the sector

Teachers’ views – Work trajectory

- 42 started working before the age of 23
- 12 have less than 5 years of educational experience
- 17 have been less than 5 years in their current school
- 19 have some hierarchical responsibility in the school
- 16 teachers have enjoyed experience in the sector, 6 of which do work in the sector, with other 11 working out of school in other fields
- Their experience in the sector is not used for taking charge of students placements
- 18 are members of trade unions, mostly in public schools

Teachers' views – Vocation

- More than half chose tourism for their call in the sector
- Hardly any (4) has a record of family tradition in the sector, though these are the ones who work in the sector outside of school
- Almost all (47) do have a vocation for teaching and working with young people
- Their vocation towards tourism does not seem to have a relation with their role as being in charge of placements

Teachers’ views – VET in the sector

- 16 complain about the obsolete equipment and the lack of budget
- 8 complain about ‘lack of professionality’ and ‘lack of vocation’
- 9 consider the lenght of VET too short to provide quality training
    - A vast majority of this do work in public schools
- Only 5 of them complain about the students
- Placements are highly valued

Teachers’ views – Labour market

- 28 consider VET is aware and respondent to labour market needs, 16 consider it is not
  - Those who work outside school are the ones who think curricula are obsolete and not attemptive to the context
  - Those who hold responsibility posts in the school tend to consider it better
- Yet, it seems that those aware of inadequacies, particularly those who work outside school, don’t do much with regard to it

Teachers' views – Their work as teachers

- 41 are highly satisfied as teachers
- 20 of them enjoy working with young people
- 9 have serious concerns about their pedagogical capabilities
- 3 enjoy teaching for the wage, the autonomy, the holidays and the working hours
- Their sources of insatisfaction are problematic students, the failure of the educational system, relation with colleagues and the social status of the profession (4)
- 20 are not able to disconnect from school

Teachers' views – Career prospects

- Most of them do not perceive chances to promote within the school system: teaching as a 'flat' career
- 29 have the will to improve their work and enjoy it
- 2 burnouts
- 1 moving to start his own business in the sector
- 4 would move to another job in the sector of tourism
  - It is those from public schools who would change something in their careers (11 of them are civil servants), those in private schools are happy to remain as they are
- More than half feel overeducated in regard to the sector and pedagogies; continuing education is not highly valued

The worker in the teachers' discourse (1)

1. Involvement in the profession
    1. Ready to move and to work hard and to accept what the profession brings
    2. Be patient to find something that matches expectations
2. Significance of work
    1. High competition, though the company is a social agent
    2. You don't work for money here, you have to be creative and innovative, and care for your team
3. Corporate references
    1. Self employment as a goal in the long term (cooks)

The worker in the teachers' discourse (2)

1. Labour capital
    1. Ethical values for optimal performance: honest, clean, responsible, good colleague, patient, kind, willing to improve, serious, punctual, disciplined
    2. Technical knowledge
2. Experience of the hierarchy
    1. Superiors expect from them the same as clients
    2. It is their responsibility to adapt to the circumstances

The worker in the teachers' discourse (3)

1. Involvement in the product
    1. Your own performance is your best reward, contributing to your self-esteem and recognition among colleagues
2. References to training
    1. Importance of theoretical knowledge as well as practice
    2. Will to learn, to improve, be motivated, aware of innovation
    3. It is their responsibility –and it takes important efforts- to keep up to date
    4. Your call makes you get involved in training

STUDENTS' VIEWS

Student´s view: Methodology (1)

- Data gathering:
  - (i) Questionnaire;
  - (ii) Debate upon a case developed from the pilot interviews to employees;
  - (iii) Projective technique with slides of real workplace settings and situations in the sector.

- Information gathered in the subject area ‘Introduction to the world of work’.
  - Recorded in tapes and transcribed.

Student’s view: Methodology (2)

The sample:

- 8 schools that offer level 3 VET for either restoration or hotelry:
  - (i) 2 private: one of them promoted by employers in the sector;
  - (ii) 2 promoted by the governmental agency for the development of the sector;
  - (iii) 4 of them public VET schools.
- Nearly 60% women
- Age range between 16 and 45 years-old
- Most of them work or have worked in the sector

Student’s view: Inquiry assumptions

- Two main research questions:
  - How they are (re)socialized in these VET courses.
  - What notions of work develop these students.
- These might be based upon:
  - Their notion of work.
  - Their career expectations.
  - Their ideal models (what a good professional should be).
  - Information from subject areas: Student’s work experience and introduction into the world of work.

Student's view: Notion of work

- The main atractive feature is how dinamic the sector is for students.
- They are so glad with the work that they don't mind seasonality, timetables and wages (they even think that wages are better than in other professions)
- Satisfied with training received in VET schools. They perceive themselves as well prepared and ready to start working anywhere.
- Never stop learning. Most of them want to go on studying.

Student’s view: Future perspective

- They perceived themselves well placed in five years.
- All of them want to go on further education (university degree).
- Future workplace: good wage and good possibilities of learning on-the-job.
- Find a job: easy and quick.

Student's view: Models

- Know how to deal with public.
- Interest on learning.
- To be professional.
- Responsible.
- Patient.
- Humanity.
- To be a good mate.
- Perseverance.
- Dedication.
- Need to be able to make sacrifices.
- Autonomous.
- Creativity.

Student’s view: Work experience

- Labour experience in the sector due to:
  - Need of pocket money.
  - Learning.
  - Experience.
  - Need to work.
  - Pay their studies.
- Most of them have an eventual relation with sector, but want to look for something better.

The worker in the students' discourse (1)

1. Involvement in the profession
    1. Ready to move and to work hard and to accept extra hours, long working days, working on holidays
    2. If you work hard and you are good, they will know and you will be able to promote
2. Significance of work
    1. This is a call, you have to feel it
    2. You find your rewards in satisfying the client and the very fact of working with people
3. Corporate references
    1. Working for a well known chain is good for the conditions, not always the prestige
    2. Self employment as a goal for some (cooks)

The worker in the teachers' discourse (2)

1. Labour capital
    1. The values of the vocation must show here for they are the key to professionality: clean, responsible, good colleague, patient, kind, willing to improve, serious, punctual, disciplined
    2. You have to master the trade: dedication, spirit of constant improvement, ready to sacrifice
2. Experience of the hierarchy
    1. Superiors may cause problems and they are perceived as a source of conflict

The worker in the students' discourse (3)

1. Involvement in the product
    1. Your work for yourself, then you do good for the client
    2. The quality of your work is what pays for the working hours and low wages
    3. When your work is acknowledged, that keeps you going
2. References to training
    1. Importance of having a qualification
    2. Work experience is what counts mainly
    3. Most of them are attending VET to compete in better conditions
    4. Training is a load but it comes with the trade

CONCLUDING REMARKS

- Common aspects in discourses of the different groups
- Discussion of findings

COMMON ASPECTS IN DISCOURSES (1)

- There seems to be a ‘pride’ of working for the sector, and this is a topic explanation to justify its peculiarities
- Students as well as teachers are aware of the sector trends
- Students as well as teachers are aware of the working conditions
- The role of teamwork is important in the sector, insofar ‘we are all in the same boat’

COMMON ASPECTS IN DISCOURSES (2)

- Because of the emotional aspects of discourse, socialization seems to be very strong
- In the case of cooks, there seems to be a particular community of practice differentiated from the rest
- Many factors seem to contribute to the development of a ‘sense of belonging’ to the profession
- There are opportunities in the sector and therefore professional expectations are raised at all levels

DISCUSSION OF FINDINGS
(1)

- There seems to be a strong influence of discourses of employers embedded in all other agents
- Such dominant discourse provides elements anchoring workers' identities
- Socialization is purposefully promoted in both formal and informal ways

DISCUSSION OF FINDINGS
(2)

- The occupational role as well as position in hierarchy have an impact upon identity discourses
- Tensions are found between sources of satisfaction and insatisfaction. Anchors to solve those tensions are: the calling, the occupation ethics, common effort, identification of all with the service provided
- Growing importance of formal education and of having accreditations, despite experience is what counts more and there is not much use of continuing training

DISCUSSION OF FINDINGS (3)

- Individualization and fragmentation of labour relations; there are no corporate discourses and workers assume this, despite the weak situation in which they find
- Employers seem to ignore the existence of precarity in the sector, but also workers and students perceive it as caused by lack of professionality and search for identity anchors like the calling to justify this

Vocational Identity an Working Conditions in the Sector of Tourism:
Today VET Students, Workers of Tomorrow.

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Abstract:

Today VET Students, Workers of Tomorrow This paper draws upon qualitative data from a research project (Vocational identity, flexibility and mobility in the European labour market - FAME) funded under the 5th Framework Programme of the EU. The data used here was obtained using several research tools as part of the research we conducted in Spain. It is about work in progress. It relates a part of the project that aims to explore the relationship between Vocational and Educational Training System of the Tourism sector and the identity formation of the participants as workers. The transformations that happen in the European labour market have a direct influence on the conception of the self-identity as a worker. The sample we have used consists of all the students of Cookery and Hostelling, both of which are certificated courses that belong to the formal system of Tourism . We are exploring the similarities, differences and peculiarities that these students have in their understanding of the meaning of work. This research enables us to understand how current fundamental aspects and changes in the labour market are impacting on student's daily work and their self-identity formation in a specific productive sector. Insights from the research allows us to define the appropriateness of the educational formal system on VET-education in relation to the new demands of the labour market on the Tourism sector.

Introduction.

This paper draws upon qualitative data from a research project: Vocational Identity, Flexibility and Mobility in the European Labour Market – FAME). The information described in it, is related to the general aims of the project focusing on the Tourism sector. We are looking for capturing the nature of the relations between different agents in this sector (employers, employees, teachers and students)[1].

Our aim in this part of the project is to explore the relationship between the Vocational and Educational Training system (VET from now) of the Tourism sector and the identity formation of the students as future workers. In Spain, the VET system is addressed to different target populations, an it is a mixture of three systems. The present paper takes into account one of these system: the one belonging to the formal and national system of education, specially its develop in the Valencian region.

In the beginning of the FAME project, it was not intended to ask students about their identity formation as future workers, but as the project goes we think that it might be interesting add to our research findings the student's point of view. We were looking to compare the representations of the world of work by the students and those of the employers and employees. So, this paper pretend to reflect which is the nature of the beliefs related to work that the students have, and which is the notion of work that they are taught in their courses.

Inquiry Assumptions and methodology.

Our two main research questions are: (i) How the students are (re)socialized in these VET courses; (ii) and what notion of work develop these students.

As a post-compulsory education, is usual that in these kind of courses people has already been in touch with the labour market, or combine both work and studies. So, we wanted to know how was their notion of work and how they were socialized in the job placements they had or have, and grasp the gap with the socialization on these VET courses. This is related as well with the notion of work taught in the courses, and the notion of work learned by the students. As we will see further on in this paper, the sample is heterogeneous enough to give us a widespread information on this two points.

We develop these research questions looking for information relevant that might be based upon:

- Their notion of work.

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[1] In order to know more information about this part of our work in the project, see papers presented by Ignacio Martínez, Fernando Marhuenda and Alicia Ros at the ECER 2002.

- Their career expectations.
- Their ideal models (what a good professional should be).
- Information from subject areas: Student's work experience and their introduction into the world of work..

To grasp this information we asked as well teachers as students of the tourist sector of the Valencian Region in Spain.

With the students, data gathering was conducted through three different kind of tools:

- a questionnaire on several identity fields: personal relations, expectations with regard to work, views about what is work, views about their work and their studies.
- a debate upon a figured case on the profession they are studying, that we take from the pilot interviews to employees.
- a projective technique with slides of a real workplace settings and situation in the sector, with an open debate about the slides.

As we attended to the schools, we were placed to grasp the information in the subject area 'Introduction to the world of work'. Both debates were recorded in tapes and transcribed later on. We were interested as well in the student's teacher point of view so we sent a questionnaire by mail related to the same subjects addressed to them.

The sample of this part of the research is composed of 8 schools, and consist of all the students for either restoration or hostelry, both of which are certificated courses that belong to the formal system of tourism. The 8 schools are:

- 2 private (one of the promoted by employers in the sector)
- 2 promoted by the governmental agency
- 4 public VET schools.

In these schools we get in contact with 10 different class groups. Nine of them were studying the high VET and one of them the intermediate one[2]. There is an important subject to remark: even if these courses belong to the formal educational system, there is an special exam for people who can prove their work in the sector for three or more years. That's why we have found a large age range: between 16 and 45 years old. This wide age range corresponds to the high VET.

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[2] In the Spanish VET system there are two different levels of courses: an intermediate level (*Ciclo Formativo de Grado Medio*) and a high one (*Ciclo Formativo de Grado Superior*). They are addressed to people with different levels of accreditation. Both of them have different diploma, and they are a two academic year courses. To be able to access to the intermediate level of VET you need to have the 'Graduate on Secondary education', the only one provided after successful completion of compulsory education. It provides the first specialized VET. To have access to high level VET, you

We have to take into account that in this sample it is reflected the students population of VET formal system, and nearly a 60% of it are women. As we say in the preceding paragraph population is quite heterogeneous, and corresponds to people with a pretty well defined notion of the values of the courses for the work.

Our inquiry assumptions related to their previous experience of work is safe: most of them work or have worked in the sector. We are quite happy with the collaboration in the gathering of information with students and teachers.

Student's notion of work

In general terms, what we wanted to know with the interviews and the questionnaire was the student's notion of work, through their actual vision on the profession. Most of them have already work in jobs related to the tourism sector and the major part of the students interviewed were on their final year to get the diploma.

Our starting point is that we are addressed to students with a clear notion of their position in these courses. Even if most of them are working in the sector, all of them are 'successful' students of the formal system. That's important in order to understand their vision about the values of the training provided and the future representation of their work.

They know different aspects of the profession through their own experience on the sector, and through their on-the-job training provided on the courses. Even so, there is an important question to take into account: these students have a large practical training of their field, so it's quite important their reference to the differences between theory and practice. For them, it's very important to pass through a formal training on hostelling or cookery, because it's the only way they have to learn how to do things in a proper way. But there is a difference between the reality of the workplaces and the learned theory at the school. This difference its related to needs of time, space and the resources available at the real place where the organization doesn't play the role played in the school. In the school the administration of time and spaces don't have to respond to needs of the real workplace (the most part of the time these needs become urgent as customers are waiting for the services).

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needed to have the 'Graduate of Post-compulsory Secondary Education'. After completion of high level, one is awarded with the title of 'qualified technician' in the corresponding area.

Passing through school experience is the way the students find to make possible to reinvent the theory. The knowledge acquired in school is perceived as a 'theoretical' one, sometimes far away from the real practice. But that is not perceived as a bad feature of the scholar system. It is perceived as a good experience that everybody should pass through it because acquiring this kind of knowledge give them the opportunity to make flexible the own practice. In others words: the think that knowing how to realize the different functions properly is the way they will have to face the future conflicts at the workplace.

So the years passed studying allow student to achieve the adaptation strategies needed to resolve a full range of situations, all of them possible at any job they will have. That's why we think that these students have, in some sense, a clear notion of the sector. They can perceive that practice is often changed due to external factors to the enterprise. The balance between resources available in the enterprise and the supposed needs of time and space to fit the offer of the enterprise to the demand of the customers is something that remain uncertainly for the workers even when they have quite experience. That's why students think that they have the tools to reduce the uncertainty but this really get reduced as they acquire experience at different workplaces.

As VET students are highly satisfied with the training received in VET schools, they perceived themselves well-prepared to start working anywhere. It is general in the answers of the questionnaire to find two moments in their career, as we will see in the next part of this paper. The first one is related to the wide range of jobs these students think they want to have before starting their 'good' job. It is common to read in their answers which is the most attractive feature for them: how dynamic the sector is for them.

They don't perceived their future work as hard due to the creative possibilities that the sector offers them. They are so glad with the work that the don't mind seasonality, timetables and wages (they even think that wages are better than in other professions). One thing they repeat is that they don't mind working festive days, at Christmas, summer holidays, etc. because they understand the needs of the sector and that seasonality is one of the bad features, but a necessary one.

They are so satisfied with the training they are receiving that they have in general a romantic vision of the training and of the job placements. They know that every workplace is a different world due to the companions and to the enterprise culture, but they think that with a two years experience its enough to acquire a good level of experience. They expect to be these years in different job placements so they can get the more experience as possible.

For them is important to go on learning and to go on with the training. Due to that it is impossible to make longer the VET courses (as some of them would wish), most of them want to go on studying the university degree on tourism.

Finally, we asked them to resume their notion of work in a sentence, by defining a good worker in the sector. Here we present some of the most representative:

- A good worker is someone who knows how to cook, who never stop learning
- Someone who accomplish his/her job.
- A responsible, good and worker person.
- A professional who knows his/her function deeply.
- Someone who knows the maximum about the sector, and how to apply this knowledge.
- To be professional, flexible, to know t work in team, able to resist stress.
- Someone open-mind, a good public relations.
- A professional: an specialist, a well formed person able to work hard and honestly.

Student's career perspective

As we said in the preceding section of the present paper, most of the interviewed students were studying the high VET level. But, in fact, more than 50% of them wanted to enter to the university degree. The proceeding to start studying this university career pass by having the mark corresponding to it. As it is high enough, most of them stayed out of it so they decided to study the high VET, and after it, get inscribed in the university. Anyway, they have to take a good result at high VET, because it will be the only way to entering the university.

The high motivation on the tourism sector doesn't get low because of that fact. For them the training provided in the VET courses is good enough, and it is seen as an intermediate step to the future they represent on their mind for themselves. Another step through this future is the university degree.

So, most of the students who wants to continue, are highly motivated to training and studies. They perceived themselves well placed in five years, but this situation pass through spending this first five years studying and acquiring the experience enough.

Even if nearly all of them want to go on further education (related to different aspects of the their sector: informatics studies, administration, languages, masters, diplomas, different specialized coursed related to cookery or hostelling, and of course the university degree), all of them agree in the subject of the needs of education of the sector: to improve they practice it is needed not to stop learning.

The relaxed vision of these students related to the time they want to spend studying is not against the needs of work. For them, find a job it's easy and quick. Even a good job in their sector like a big hotel or a good restaurant. They give a lot of importance to their future workplace. It's important how prestigious the place is. They are looking for a good treatment to customers (quality and service) and related to the own employees of the enterprise.

Nearly 90% of them, has a clear future for themselves. They all want to manage their family business, or even their willing is to be able of creating their own business. But this is seen as the final goal to achieve. The very first years, 5 to 7 more or less, are the training years. Not only referred to formal studying but highly focused on the experience of places with enough reputation on the sector. They think that is easy to achieve because of the quickness they have to find a job due to the bad features of the sector: in this case, for instance, seasonality is well seen because this fact allow them to find a good job.

They have an idea about how their future workplace should be: with good wages and good possibilities of learning on-the-job. As they perceive the labour market collapsed in other sectors, they found the features of their own sector as an advantage . this is related to the good wages that it's easy to found at the hotels and restaurants. Even if timetables are terrific for having a 'normal life' this two features compensate the others. They think they will work where they will find themselves as better paid, but they give importance to the freedom they need to feel at the workplace. They understand that a good workplace must have a high level of autonomy to improve their creativeness, and this feature allow them to choose jobs on hotels or restaurants not that reputated as they should wish.

One difference between restoration and hostelling is that for the first geographical mobility is not perceived as needed. However, for the hostelling students traveling is perceived as one of the best features of the sector. Even if they are forced to move fro their town they agree that this is a very interesting point of the nature of tourism. This feature allow them meeting people and learning different ways of working.

Student's models

For us, it was interesting to ask students about how were their models on the sector. As we remark before, the most of them are working or have work. Even so, many of them have a family business. So, the students we have interviewed have a quite good reference of the ideal of a worker should be. We asked them about how they think a professional on the tourist sector should be, the qualities and the ways of managing at the workplace.

For them, the qualities that a good worker should have are:

- To know how to deal with public
- Have an interest of learning
- To be professional
- Responsible
- Patient
- Humanity
- To be a good mate
- Perseverance
- Dedication
- Need to be able to make sacrifices
- Autonomous
- Creativity

We asked them to think on a professional they looked up to. As we perceive in their answers we should point that even if learning and training is important in order to play a good performance on their workplace, this has to go on the hand of the good ambiance at the workplace. Even if you have the work of your dreams, if there is a bad feeling around the hierarchic relation (with boss or with elder companions) there is no way wanting to stay working there.

Even here we can sign again their romantic vision of themselves at a workplace. They seem to be so highly motivated that the bad features of their profession (timetables, seasonality…) are perceived as less important at the workplace due to the relationship that they found in the enterprise.

Student's work experience

As we have said most of them have already a labour experience in the sector. We asked them for the reason, and there are quite different answers. They have labour experience due to:

- Need of pocket money
- Learning

- Experience
- Need to work
- Pay their studies

The kind of work they are performing it's not the work they should wish for them in the future. Anyway, they know that it is easy to find this kind of jobs at fast food restaurants, small hotels, canteens, family business, cafeterias, and small restaurants. This kind of jobs are understood as a good experience in order to find a better job, once they will finish their actual training. Even if they want to go on studying, they understand their career an straight line where you must pass by all this different kind of jobs.

So, most of them have an eventual relation with the sector, but want to look for something better as we have explained before.

Conclusions.

There is for us a clear situation related in the vision of the students about their future labour market sector. It seems that they have understood clearly how it is build the future career in this sector. These students have clear goals to achieve. They understand that the path they have to follow is made of training (in order to achieve a good performance) and of being able to make relationships. They are so highly motivated to the future work and to the profession itself, that they don't mind some features minded when they are asked as workers.

They mind seasonality now, because they understand that their actual workplace is just a needed step in order to achieve future goals, as we have describe through this paper. But they think that in the future workplace they will have, one that satisfied their expectations, they won't mind seasonality because it will be seen as less relevant compared to the advantages that wages and relationships will give them.

They give as much importance to the training as to the experience at performing. It seems to us, like if they make a clear difference between the kind of jobs, not wanted jobs, you can find in this sector now that they don't are experienced enough and they kind of creative, autonomous and attractive job they will have in the future. That's why we've pointing that we perceive their vision as a mixture of romanticism and reality, built through their on-the-job learning and on the vision of people they look up to, but hoping to see reduced the bad features of the sector as soon as they arrive to the workplace of their dreams.

Session 7C, Workshop (059), Lisbon, 13. 9. 2002, Room 10

Workshop Documentation

Engage to Learn – Situated Learning for Social and Professional Integration.

Theoretical, methodological and practical implications of researching social and professional re-integration programmes for disadvantaged young people in Europe.

Contributions from
Beatrix Niemeyer, University of Flensburg, Institute of Vocational Education and Training
Sue Cranmer, University of London, Institute of Education
Inka Neunaber, University of Flensburg, Institute of Vocational Education and Training
Eeva Laamminpaa, University of Jyväskylä, Department of Education

Introduction (Beatrix Niemeyer)

Most of the EU member states have launched specific programmes aiming at social and vocational integration of socially disadvantaged young, to increase their trainability and employability and to promote engagement to education and training. Based on constructivist assumptions the innovative educational approaches of these programmes focus on individual abilities and competences and highlight the importance of a close relation to work place reality. This paper presents work in progress based on several EU and national projects.

Youth unemployment remains one of the most serious problems in the EU Member States, affecting especially those who have difficulties to perform at school. Specific programmes have been designed to prevent the drop-out of this target group of socially disadvantaged, be it teenage mothers in Britain to street boys in Lisbon. These programmes share the aims to increase the trainability and employability and to promote engagement to education and training. Innovative educational approaches focus on individual abilities and competences and highlight the importance of a close relation to work place reality. At the practical level, however the implementation of these situated, work based approaches often face a variety of obstacles. Primary research on European level is still scarce. Little is known about

- the **long term effects** of VET preparation programs
- the influence of **socio-economic and cultural context** of modes of school to VET transition
- the **learning effects** on the individual level
- **obstacles** preventing the implementation of innovative education and training methods.

Educational theory is challenged in two ways:

- the so called new learning cultures are to be tested for their integrative capacity and their effectiveness in troubled learning situations;
- the relation of cognitive and social processes needs to be further explored.

This paper mainly draws from the empirical research carried out in relation with the Leonardo project *"Re-Integration. Transnational evaluation of social and professional re-integration programmes for young people"*, which, building on a multi-level approach, aims at a **systematic evaluation of Re-Enter programs applying situated learning on a**

transnational basis, including the development of appropriate tools for a primary evaluation. The leading questions are: **How does situated learning help to improve Re-Enter programs? How can the improvement of Re-Enter programs through situated learning be assessed?**

The following contributions give insight in current research and focus on three different perspectives. The first paper (Sue Cranmer, UK) presents the individual perspective on social and vocational integration and critically asks if and how programmes meet individual needs or encourage personality development and self-responsibility of the young participants. The second contribution (Inka Neunaber, Germany) presents a German example of further training of trainers working in integration programmes and in the third paper (Eeva Lamminpaa, Finnland) the specific action research approach is introduced and crucial methodological issues are raised.

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How do support programmes meet individual needs? A critical reflection of UK practice (Sue Cranmer)

In the UK study, we are looking at the 4 following programmes:

Programme Name	**Gateway**	**New Deal**	**First Base**	**Having a baby**
Target Group	People who have been unemployed for 6 months	People who have been unemployed for 6 months	Lifeskills for unaccompanied Asylum Seekers who are minors	Lifeskills for young parents
Provider	Tower Hamlets College, London	South Thames College, London	Finding your feet, Kent	Enterprise Training Maidstone, Kent
Age	18 – 25	18 – 25	16 – 18	Approximately up to 18

Today's case studies are drawn from the ND and HAB programmes.
The first case study features Uldash (his name has been changed)

Uldash has been taking the New Deal programme since April 2002 at a Further Education College in South London.

New Deal was established by the UK Government in 1998, targeting those who have been unemployed for six months or more. The focus when the scheme was set up was to get young people, long term unemployed people, single parents and disabled people into employment. At the induction session I attended, the programme aims are presented as providing a range of skills and knowledge in addition to encouraging a positive self image (ie raising self-esteem), increasing self knowledge and raising client expectations and awareness of what they want from life, jobs, careers. Also to give the clients a realistic idea of what they are capable of. The clients are enrolled on various recognised formal qualifications for a period of up to one year though the average is about 9 months. The courses include vocational subjects such as painting and decorating, IT, catering, childcare and English for Speakers of Other Languages (ESOL).
Initial assessment determines whether they have basic skill/ ESOL needs and if they do, this takes precedence.
The structure of the course is as follows:
Clients must complete 30 hours of study per week

- 12.5 hours must be spent in their vocational area which for Uldash is ESOL

Remainder of their time consists of:

- Job search, ie must do 4 hours a week
- Private study in the library (must get checked in at enquiry desk)
- Home study
- Work experience placements (ESOL students are exempted)
- Netwise (this is a community project located in the college which provides resources such as computers for students and local people to search for jobs)

New Deal is well served in theory in that each client has the following resources to call on:
Two main members of staff are responsible for them during the programme:

- New Deal Advisor
- Personal Tutor

They also have access to the following as needed:

- Education and training advisor
- Career Advisor
- Placement Officer
- Employment Service Advisor (external to college)
- Community Access Centre
- Dyslexia/ basic skill support
- Student counsellor

At present, like many London colleges, South Thames has a high population of people of different ethnic origin including Asylum Seekers and Refugees. At present, over 50% of the New Deal clients at South Thames have ESOL needs. The New Deal Advisor responsible for them has 50 on her books at present from a range of countries including Afghanistan, Iraq, Kosova and Sri Lanka. She reports that these numbers have doubled in the last year. I've chosen Uldash as he is fairly typical of the ESOL students I have met both doing New Deal, and doing the Gateway and First Base programmes.

Background

- From Afghanistan
- AS/Refugee
- Has been here 18 months (at April 2002)
- He has leave to remain here for 4 years - Exceptional leave to remain (ELR)

Reason for disengagement

- Disengagement is result of collapse of educational system in home country, not necessarily learning problems in common with many of the asylum seekers on these programmes
- Was educated to the age of 17 but left school without taking exams, he wants to take exams here to use gain from his previous education

Social circumstances and general living conditions

- Uldash lives with his cousin and two others in a shared house (this is less usual that he has family here)
- He has family in Afghanistan (again this is less usual)
- (More usual), he has problems with his landlord and this is very unsettling for him. (More of this below)

Ambitions for the future

- He would like to go to University to study Information Technology (again, this is often cited as an ambition by the male clients)

Current learning context

- (A feature of these programmes is that many youngsters attending them are disillusioned and cynical about these schemes)
  However, Uldash is highly motivated and determined to succeed at interviews 1 and 2 but increasingly frustrated and disillusioned by interview 3 (at the 3 – 4 month stage). (I will explore the factors contributing to this change in him below).
- His spoken English has much improved during the 3 – 4 months I've been talking to him.

Key points

Having closely observed both the college's New Deal provision and Uldash's progress through it, I would like to raise the following critical points:

Community of practice – established as a wide and broadly encompassing unit formed through people who are involved in the scheme and who pursue shared practice and performance within the scheme. Whilst New Deal has provision for this, it is clear that in reality, a gap exists between provision and take up by the client:

1) For instance, as mentioned previously, Uldash has encountered serious problems with his housing. He was awaiting money from the consulate to pay for this whilst negotiating with his landlord who wanted to throw him out for non-payment. Unsurprisingly, he was anxious and unsettled by this. However he had not made his New Deal Advisor aware of this problem. She could have advised him to see the Housing Office and perhaps even the student counsellor, etc.

The following are tentative suggestions of why this problem arises in the community of practice:

- The resources available to students in the community of practice are introduced on their first day, often clients are anxious and in the case of the ESOL students, their understanding of the proceedings can be very low, unfortunately no language support is available. Literature provided is also in English.
- Distrust/ fear of authority. Often disengaged youngsters are fearful of authority figures such as New Deal Advisors particularly for Asylum Seekers who have often been through traumatic experiences in their home countries and to get to the UK and have undergone a very high level of personal scrutiny to be allowed to stay in the UK.

- Not recognising the pastoral role of the New Deal Advisor. The role of the New Deal Advisor is far reaching and, in my opinion, quite difficult to negotiate for the staff themselves. On the one hand, they represent an extension of the Employment Service into the College in that they are responsible for the bureaucracy, ie the monthly reviews, weekly time sheets, registers, etc that ensure the client receives their benefits if they follow the rules. On the other hand, they have a pastoral role which requires that they are the client's official 'friend' and will help them when difficulties arise. There may be conflict within these roles.

Features of situated learning established by the Re-enter project were as follows:

- Facilitate/provide authentic activity
- Provide a context that reflects the way knowledge is used and developed in real-life
- Provides insight through multiple perspectives and changing roles for the members of the community
- Supports collaborative construction of knowledge
- Provides support and aid/help, mentoring as a safety net
- Promotes reflection to enable abstractions
- Promotes articulation to enable tacit competencies to be made explicit
- Provides a clarification for one's own position

In some ways, these intended features of the New Deal programme fail due to the mismatch in Uldash's ambitions with the scheme he is on.

2) The programme is aimed at finding work but Uldash's aim is more academic and if his self-evaluation is fair, he is academically able. His main objective is to pass qualifications so that he can rejoin the normal route to university. But the course has been set up to get him into work. Therefore, he is not allowed to take other courses apart from ESOL courses until he has reached level 3 (intermediate) that is seen as the minimum requirement for him to get a job.

Whereas he was motivated and enthusiastic about New Deal in interviews 1 and 2, he is feeling increasingly disillusioned by interview 3.

Some of the reasons for his frustration appear to be undermining the situated learning of the programme:

- He is finding a lack of meaning in continuing his ESOL studies when he feels his spoken communication skills should be sufficient to begin an Information Technology course plus there's a lack of variety in doing just English
- He is finding a lack of meaning in the job search parts of the programme as he is not interested in finding full-time work at this stage
- A real worry for Uldash is that if gets sent back to Afghanistan, he may only have developed his English which will not help him in the future. He is very aware of the benefits of a wider education and qualifications.

Sally

The second case study features Sally (again, her name has been changed).

Sally has been attending the 'Having a baby' component of Lifeskills for 1 month from June 2002 though she had been through the Lifeskills programme previously from February 2001 – April 2002 and achieved the ASDAN award (these blend an activity-based curriculum with a framework for the development, assessment and accreditation of Life skills and Key skills).

The 'Having a baby' pathway exists within Life skills provision and is under constant development. The scheme is due for relaunch this September under the new name of the 'Learning Gateway for Young Parents'.
This course was the result of the Careers Services' unease at referring pregnant young women to the usual Lifeskills provision. Kent has the highest teenage pregnancy rate in the UK. The programme aims to provide support for pregnancy (viewed positively), preparation for childbirth and beyond whilst also addressing more academic possibilities. It is hoped that NVQs will be introduced but at present, lack of child care facilities prevents clients from returning to education and training after their babies are born.
All Lifeskills programmes incorporate:

- English Language
- Budgeting
- Housing
- Healthy Lifestyles
- Drug awareness
- Sex education
- Rules and responsibilities
- Self-awareness
- Attitude and values
- Anger Management
- Careers

In addition, the pregnant youngsters undertake modules such the following:

'Having a baby'
Objective: To increase awareness of the cost of a child.
Method:
Visit a Baby Supply Stockist eg Mothercare
Visit Department for Social Security
Visit a Supermarket
Activities:
Visit Baby Supply Stockist to find out cost of outright items needed for a baby;
Recording costs of items on list;
Visit Department for Social Security to find out about benefits;
Visit a supermarket to find out costs of toiletries needed for a baby.
Initial assessment determines whether they have basic skills needs and they will be supported with these if needed.

The course environment is varied so that as many activities as possible are conducted outside as in the module above which involves practical learning.

Community of practice

- Personal tutor/ Youth worker
- Basic skills support worker
- Counsellor (also two of tutors have counselling qualifications)
- Many services (ie Cruse for bereavement, etc) that get called in as needed
- Frequent outside speakers – sex specialist on safe sex, school nurse on using contraception, drug taking, police on law and order, bank worker talking budgeting, various workers talking about their jobs, bus company talking about understanding timetables.
- Midwife and Health Visitor
- Outside speakers – National Childcare Trust
- Social Services, Youth Offenders Team, Care workers, etc.

The Life skills clients including those having babies have low educational qualifications. The tutors have reported that most of their clients in general have grown up in disadvantaged and problematic home backgrounds.

Clients earn £40 a week (about 63 euros) which they would not be entitled to otherwise (including being at Further Education Colleges).

Back to Sally…

Background

- 18
- 5 months pregnant
- Has been on the 'Having a baby' course for 1 month

Reason for disengagement

- Left school at 15 with no qualifications
- 'Hated school', did not get on with the teachers or other students; was frequently in trouble at school, truancy, smoking, etc
- Worked as a shop assistant in two different women's clothes shop, left due to low pay and long hours.
- Had spent a year on the Life skills programme previously from February 2001 – April 2002 (completed ASDAN award)
- Was looking for part-time receptionist or retail work when she found she was pregnant.

Social circumstances and general living conditions

- Sally was living at home with her Mother when she discovered she was 2 months pregnant
- Her Mother was originally shocked but has accepted the baby and is excited now and more confident that Sally and her boyfriend can take care of her/him
- Sally has been with her boyfriend for 3 years. He has recently set up a landscape gardening business and they now have their own 1 bedroom flat. They expect to be rehoused to a 2 bedroom flat 6 months after the baby is born.

Ambitions for the future

- Sally has given up learning to drive but hopes to resume this when the baby is born
- She hopes to find part-time evening work 'to help out' when the baby is 2 years old. She thinks a couple of hours in a supermarket in the evenings would be okay whilst her boyfriend takes care of their child.

Current learning context

- Sally is finding the course useful and is enjoying it, particularly the contact with other pregnant teenagers and the tutor/youth workers
- She wants to stay on the course until her baby is born particularly as she would be 'stuck' at home on her own otherwise

Key points

Community of practice – in contrast to the problems that we saw with Uldash on the New Deal programme, Sally is benefiting from the community which is providing her with important support:

1) For instance, Sally speaks highly of the organisation and particularly the support she has received from one of the youth workers, Lorraine, and one of the other pregnant teenagers, Jill. This is probably due to the following factors:
   - The atmosphere is very warm and supportive. The staff have an open door policy and a philosophy that 'everyday is a new day'. The environment itself is very friendly in that it is a house and decorated in quite a homely way.
   - The atmosphere/ philosophy of the organisation has given Sally the confidence to address her problems and she feels able to seek help where she needs it
   - Compared with her previous schooling, Sally is finding her current experience positive in that she feels as if the tutors are more like 'friends'
   - Sally likes the fact that she has more than usual access to the midwife, she is also hoping to visit the maternity unit of the local hospital with Lorraine and Jill to dispel some of their fears.

Situated learning

2) The course appears to be really helpful in supporting pregnant teenagers. In situated learning terms, Sally currently finds the modules and the activities by which they are taught really useful and relevant to her situation.

Brief conclusions

Uldash can see problems in the community of practice for the reasons cited and in the concept of situated learning due to the mismatch of his objectives with those of the New Deal programme.

For Sally, unfortunately the Life skills course she took the year before getting pregnant failed to reintegrate her into education and training and/or work despite her success on the programme. Pregnancy still offered the best choice for her (she had admitted this to her youth worker before leaving the programme for the 1st time) and now her academic and career aspirations have become even lower at this point, ie her plans to work as a receptionist or in retail have grown into working a few hours in the supermarket to provide slightly more income. She started out quite well after school gaining a full-time job as a shop assistant but it appears that her experience of not coping with the long hours and low pay has set her on a different pathway of the traditional female 'career'.

Limits and potentials of assistance – an example of German practice with further training for trainers (Inka Neunaber)

The project „Handlungsorientiertes Lernen" (HOL) is concepted as a further educational training. It is addressed to the staff of the Jugendaufbauwerke Norderstedt, Glücksburg and Niebüll in Schleswig Holstein – in the northern part of Germany – for a period of two years. The Jugendaufbauwerk is an institution which offers preparatory programmes for vocational education and training for young disadvantaged people.

Aims of the project

The aim of the project is the exemplary initiation and implementation of situated learning in different vocational programmes and institutions to improve learning conditions and learning skills of young people.

The young should be qualified for independent thinking and acting to develop self-responsibility.

The educational staff, like teachers, trainers and social workers should be counsellors for learning or mentors to the young people. That means, that situated learning causes a changed perspective onto the own position in the pedagogical process. The young have to be motivated to find out and to try out own strategies to solve learning problems. It needs patience to accept extraordinary ways of solutions and it needs tolerance to interpret mistakes as chances for learning. An optimistic view of situated learning is demanded, because HOL succeeds in motivating young people to live an independent life: in all cases of vocational and social life.

Stucture of HOL

The project is stuctured in a Basic Training, Transfer, Presentation and Evaluation and Documentation and Publication.

In the Basic Training the pedagogical staff is qualified in three steps.

Firstly they occupy with counselling learning processes. They deal with questions like: What is learning? Which perception of teaching and learners do we have? And they practice counselling situations.

Secondly the staff is trained in competences in working with groups of heterogenous learning. They are supported in building up and developing a cooperative mental attitude to the group. Further the the use of the group as pool of skills is desired.

In the third part of the Basic Training the staff creates concrete teaching units to be implemented in the daily work.

For example: They planned an international buffet realised by the young. The young people organised the buffet with their own ideas, especially recipes, equipment, decoration and so on. It was arranged by the learners of the cooking and house-services unit for all participants of the vocational preparation and the pedagogical staff.

Transfer means the implementation of situated learning in the daily work. Trainers, teachers and social workers develop concrete projects and put them into practice together with the young people in the vocational school or in the institution Jugendaufbauwerk.

All projects can be developed inter-institutional, because during the further education project the staff of all three Jugendaufbauwerke joined together.

Now HOL should not be a method, but a mental attitude.

The next step is Presentation and Evaluation of HOL. The projects have to be presented to the whole staff of the Jugendaufbauwerke making a fruitful exchange possible.

The Evaluation is now the point of time we work on.

The last step of HOL is the Documentation and Publication.

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What is special about the HOL concept?

- All learning contents are directly referring to the everyday practice of the pedagogical staff, because learning issues are taken from the daily pedagogical work.
- There are no constucted themes from outside.
- The HOL-project is exclusively carried out with own colleages from the Jugendaufbauwerk
- and within the structured framework of each institution any project can be carried out as long as it sticks to the principles of HOL.

Example of good practice

This example of a project planned by the pedagogical staff and carried out by the learners takes place in the Jugendaufbauwerk Norderstedt.

There exists a cafeteria, where participants and the staff can buy things like snacks, drinks and sweets.

Before HOL the young people just sold these articles. They did not feel responsible for the articles and the money they received. All further management had been done by the trainers.

The educational staff of this unit, together with the young people, developed a model, that considered all aspects of running a cafeteria. This model includes the principles of situated learning.

Firstly they worked out by teamwork, which tasks were needed for running a cafeteria, e.g. accountancy, purchase, stock-taking and so on. The aim was to create a learning environment in which the young were supported to become engaged in a community of practice.

The learners are supported in learning the business of a cafeteria. They developed a management system by their own. On this way a meaningful learning is possible, because the young people know about the context of business in a cafeteria. So there can grow a responsibility for the practice, because it is an authentic practice.

The identity and the self-confidence of each learner was strenghtened by this project, because they had experienced that they can develop and carry out a planning by themselves.

What did they have to learn?

The pedagogical staff had to learn

- to further the responsibility of each participant,
- to support learners through mentoring, counselling and motivating
- and to change the perspective of the own position in the pedagogical process.

The participants had to learn, that

- the success of learning is a success of their own
- self-responsibility is a desirable aim
- and by running a cafeteria they also could practice basic competences like counting and reading.

Obstacles and tensions

What are the obstacles and tensions by implementing HOL in the daily pedagogical work?

The professional honour of several professions like housekeeping is an obstacle, because the staff is sometimes in conflict with its own appreciation of the work. For example, the housekeeper cannot accept how the young iron the clothes. The quality of the product seems to be more important than the learning process.

The co-operation between teachers in vocational schools and trainers and social workers in the Jugendaufbauwerk does not work very well. Further it could be improved in the future.

Another obstacle can be a too caring approach which stands against of the personally development of the learners.

Reaching out for the impossible?

Methodological challenges of assessing Re-integration programmes (Eeva Lamminpaa)

Introduction

Exploring re-integration programmes has been an interesting and challenging task. Our common goal is to capture multilevel factors and variation of re-integration programmes at a European level as well as identify the special characteristics of these programmes at the national level. At the transnational level there are even more challenges than at national level because of the historical and socio-economic differences of re-integration programmes in different countries. Part of our transnational research collaboration should then consist of comparing and discussing also different methodological questions in connection to this kind of challenges.

The Finnish research design differs from the approaches of the other partners because of our goal to enhance equal collaboration with practitioners of re-integration programmes as research partners. Thus we apply principles of action research approach in our national work.

Finnish research design

Our goal is to capture the complexity of our case re-integration programmes at three levels; *Educational system and employment context, programme level or activity system, Action and experiences.* At the macro level the political discussion and decisions in society related to the issue of re-integration, professional paradigms, the organisation and administration of vocational schools have an effect on what kind of re-integration programmes we have in Finland. On the other level the variation of these programmes exists in different ways at the level of actions and experiences.

We are also interested in the complexity of learning related to the different life histories of students. What is the effect of biographical context on re-integration programmes? This can give us an idea of the complexity of learning experiences. Students are interviewed three times: First time in the beginning of programme (what they bring with them into programme?), second time in the end of programme and last time half a year after the programme (what they get from the programme?). We want to track students after participation in order to find out if the programmes have had an effect on the courses of their lives (did they have any use of the learning outcomes in their lives?).

Action research approach and collaboration as leading principles

In this research our Finnish case programmes are operating as a close part of the field of vocational education. Many programmes are funded by ESF and are complementing permanent structures of VET. In other countries there are also programmes that concentrate more on social than educational integration. There are different factors affecting the development of programmes and action systems at different levels. Our cases in this study are three Finnish re-integration programmes (Kytkin, Supra, Tracs). These programmes are examined in connection of institutional actors and organisational issues, practitioners (professional and educational background) and students experiences. We want to follow the development of programmes through the course of individual studies in these programmes and by using other data. The students' interviews are considered more as a source of tracking the development of programmes than individual stories by it self. What do individual stories tell us about the programmes?

Tracs is an inclusive and supportive program in the field of VET and it operates in one department of the vocational school. **Kytkin** is an independent workshop, which offers work based vocational training for a basic automotive qualification for students in danger of exclusion from vocational education. Kytkin and Tracs operate in close relation to each other aiming to bridge students' routes in their vocational studies. Both projects are administered by the same organisation. Both of these projects also co-operate with the automotive department of Jyväskylä Vocational institute of Technology. Thus, the combination of these two different re-integration programmes is an important issue to consider too.

Supra is a supportive programme inside the vocational school. The project aims to support a transition from comprehensive school to vocational education by means of counselling. In addition to the counselling, Supra organises training for vocational teachers and "exchange programmes" between the teachers of comprehensive schools and vocational schools.

The main research activities are observations, interviews, collective reflections and analysis of different supportive data. There are regular visits in the projects including observations and discussions with practitioners and students. All the project practitioners are interviewed at least once and students are interviewer three times during the course of their studies. Also other practitioners in the field of vocational education and training (vocational teachers, people on administration level) are interviewed. In addition, there are supportive data, for example, learning logs, diaries, personal study plans. Collective reflections are implemented regularly during the course of the research. Also in other countries there is same kind of variation of different data, which is needed in researching this kind of programmes.

Various definitions of action research refer to participatory approach, collaboration, collectiveness, reflexivity and developmental action during the research process (Kuula 2000, Kevätsalo 1998, Heikkinen & Huttunen 2000). Our goal is to develop our research into more collaborative direction and thus have an effect on the practices (re-integration programmes and mainstream education). We assume that an action research approach allows us to integrate different ways of exploring re-integration programmes and capture the changes of these evolving and periodic programmes. The goal of the research is to collaborate with practitioners of re-integration programmes, analyse and reflect together different professional paradigms and other related issues, and to understand complex phenomenon of learning in connection to the life-courses of the young. We hope to have an effect on practices; at least by starting the discussion about the relationship among different factors affecting on the practices between the actors at different levels.

One goal of this approach is the contribution to the evaluation discussion. The interpretations done are built in interaction between academic context and practitioners. The practitioners of re-integration programmes are equal partners in doing the research. They are the key actors who have the practical expertise of the field. Our task is to reflect and reconstruct the issues in a collaborative manner with them. In a same way we think that the evaluation practices of these programmes should be done in collaborative manner in order to identify critical issues related to the development of these programmes (in the research project we want to enhance analytical evaluation not normative).

The main means of collaboration are regular visits in programmes and informal discussions. Every half year reflective meetings are taking place in order to discuss the progress of programmes and the Re-integration project by it self. Usually there have been introduced preliminary results that have been discussed together. These meetings are for us researchers important places to discuss and reflect the research. During this fall we will have also two different kinds of meetings. One with the Supra programme and the other with Tracs and Kytkin programmes together. In these discussions it is meant to discuss together with programme practitioners, researchers and different actors from the vocational schools.

The research design on the level of individual interviews

What this research design means on the level of analysing individual interviews. As an example I am going to use the story of Janne who was a student of Kytki-programme. What can we learn from the contradictions between the story of student and practitioners? How the context of programme helps us to see these contradictions in a new way?

Janne was interviewed firs time in the beginning of the project and was very happy to get along in this kind of work-based programme. He was good in talking and seemed to enjoy the possibility to tell about his life for the interviewer. He liked the group where he studied. "*Yes, I can say that we have a really good group here.*" He was very confident on his skills and he believed to be better than other students in the group. In the first interview it sounded that he had really founded a right place to study.

Before the second interview he had already dropped out. He explained that the reason was his private life and he could not continue anymore. About the group he said that he had withdrawn purposely from the group in the end.

Between these two interviews in the observation it was seen that Janne was not working as a part of the other group. "*Janne seems to be separate from the other group...*" ,was one of the observations. Janne also criticised the practices of programme that students were given too much responsibilities and it was not checked if the directions were understood by all the students "*Sometimes I feel here is too much pressure for the students ... I mean how this works... we are doing a lot and they do not even check properly the results.*

From the practitioners point of view the situation looked different. The practitioners were not sure if this programme was even the right place for students like Janne with learning difficulties. They thought that he had learning problems and problems in understanding, that cannot be supported enough in this kind of work-like programme, which demands a lot of initiative and responsibility. "*Janne was different from other group, he did not understand the directions... I do not know what to do if he just says -yes, yes I understand- time after time, but still he does tasks in a wrong way*" . They described that Janne had an unrealistic view about his possibilities in life. Janne had also had a difficult position in the group. He tried to be in a command of the garage, which other students did not like. Practitioners had to tell him that "*Others do not like if you try to be a boss here.*"

The context of programme is work based vocational re-integration programme, which aims to the qualification. Learning environment is a garage that is working like real enterprise. Students are studying by doing real client works in this garage. According to the practitioner students with social difficulties get more benefit from this kind of programme than students with mental problems or learning difficulties.

This comparison is not a question of who is right and tells the truth but more about what can we learn from these contradictions and different points of views and especially the interconnected nature of these point of views.

A) One thing we learned is a match between students and educators (can educators give what these students need in their backpack?). What is practitioners' background? Where they come from? What kind of professional knowledge and professional skills there are in the field?

B) Some students do not succeed in the same kind of programmes than others. Even if the student has a feeling of being in the right group, practitioners can think student needs other kind of support than they can give.

C) On the other hand this leads us to discuss about the target group of the research. What is the place for Janne in the society if this kind of work based study does not be the best option for him? What are his options if he cannot make it in the re-integration programme? What kind of support he gets for going on (what he packs into his backpack during the programme?)

D) As a researchers we have continuously re-construct and confirm our interpretations with practitioners

ECER Seminar on The European perspective of HRD

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European perspectives on organisational innovation and learning

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1 Introduction

The concept of the learning organisation or organisational learning is seen by many people to be almost exclusively derived from American (or Anglo-American) strategic management thinking which puts the emphasis purely on business effectiveness criteria.

However it is argued that a distinctive European tradition of research and development in the area of innovation in work organisation - a tradition fostering human resourcefulness through participation - has contributed to the European roots of organisational learning. In this vein, one can argue that the European organisational innovation tradition fostering employee participation and human resourcefulness can be configured as a 'European theory' of the learning organisation. This tradition is based on the distinctive industrial cultures that have arisen in European countries that place the emphasis on the integration of economic and social objectives. The later industrial cultures form a part of what has been termed the 'European Social Model'.

This paper is based on the results of a group of researchers who have collaborated in exploring and promoting European perspectives on the learning organisation. The work took place in the framework of the Cedefop research arena (Cedra). The aim of what came to be called the 'Cedra learning organisation project' has been to reflect on recent EU funded research in order to identify underlying patterns regarding the issues raised and discuss the dilemmas encountered and barriers faced concerning the implementation of the learning organisation concept in Europe.

In carrying out this task, as well as drawing on EU research reports and other literature and resources, the authors also gave themselves the objective of coming up with new conceptual frameworks that make sense of and go beyond the material presented in the above mentioned papers. The collective reflections on and discussions on the above, triggered some new knowledge development about the concept of the learning organisation which can be put forward as theses for future discussion.

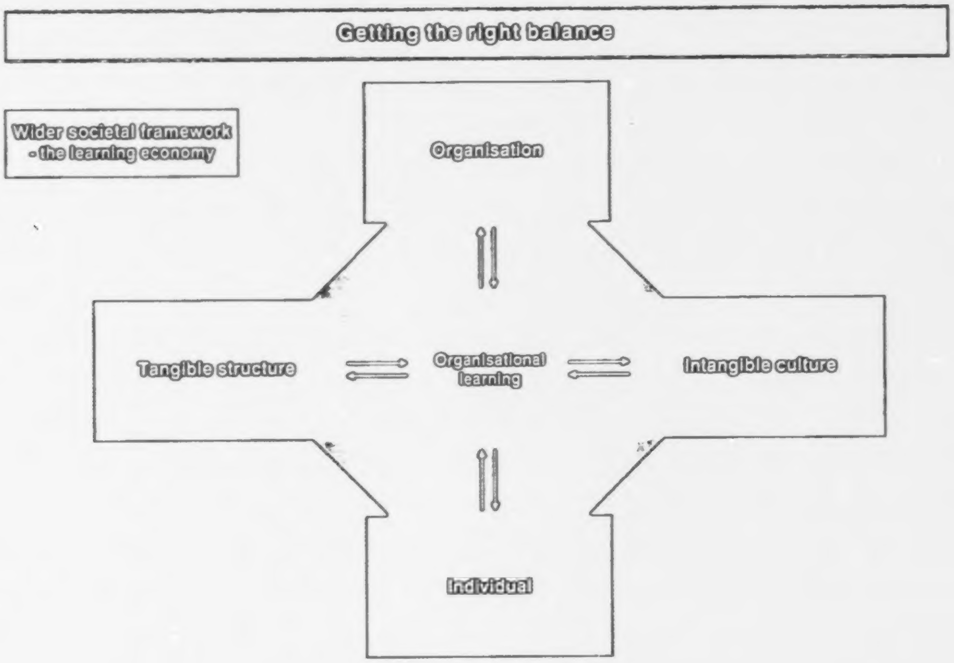
2 Theses for future discussion

2.1 The implementation of learning organisations entails getting a right balance between a) the 'tangible' and 'intangible' and b) the 'organisational' and 'individual' dimensions of organisational learning

The construction of a learning organisation is a complex process that entails :

a) ensuring coherence between the *tangible/ formal* dimension of an organisation and the *intangible/informal/flexible* dimension; and

b) reconciling *organisational performance and learning goals* (in the narrow sense of the word organisation) with the demands of *individuals* for development, and rewards and fostering their professional/career mobility inside and outside their current organisations.



The complexity involved in ensuring the right balance between these different and often competing dimensions, means that in the final analysis one cannot realistically expect more that the implementation of incomplete or imperfect learning organisations. However, this does not in any way negate the validity of the quest to reconcile these competing but 'real' factors, but on the contrary, calls for enlightened leadership from policy makers and managers and requires the skilled interventions of committed organisational learning professionals. In the 'realpolitik' the key issue is the promotion of organisations, that in a context of shifting priorities and volatile economic environments, can somehow sustain the right balance between work demands and human development demands. This calls for pragmatic and non-ideological learning coalitions involving all of the stakeholders within an organisation.

Furthermore, today's interconnected society requires wider societal support frameworks to promote the building of a European learning economy. This requires that the different interest groups (employers, workers, non-governmental organisations) work together in 'social partnerships', committing themselves to the challenge of attaining economic competitiveness goals which at the same time foster social, human developmental and learning goals.

2.2 Developmental/ challenging work tasks are a prerequisite for implementing a learning organisation

The key to promoting learning organisations is to organise work in such a way that it promotes human development. In other words it is about building workplace environments in which people are motivated to think for themselves so that through their everyday work experiences, they develop new competences and gain new understanding and insights. Thus, people are learning from their work - they are learning as they work.

This entails building organisations in which people have what can be termed *'developmental work tasks'*. These are challenging tasks that 'compel' people to stretch their potential and muster up new resources in managing demanding situations. In carrying out 'developmental work tasks' people are 'developing themselves' and are thus engaged in what can be termed *'developmental learning'*. They are developing their own work-related knowledge rather that merely adapting to the commands, rules or procedures laid down by others. Although the latter behaviour is not unimportant and is indeed an essential aspect of working life, it promotes *'adaptive learning'* rather than '*developmental learning'*.

'Developmental work', therefore, is a prerequisite for 'developmental learning'. This learning takes place through sharing in the 'life' of organisations that are undertaking 'developmental work'. It is through participating in, contributing to, and reflecting on the interactions taking place in those types of organisations, that developmental learning occurs. In other words one learns from and through the collective 'practice' that one is participating in. This is learning through participating in a 'community of practice'.[1] In this process, people are also *actively contributing* towards constructing and sustaining this 'community of practice' through transforming every day social interactions into an effective and productive collaborative system.

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[1] Regarding work values and attitudes - the foundations for motivation at work - there is a great degree of truth in the saying that 'attitudes are caught and not taught'

2.3 Provision of support and guidance is essential to enable developmental work to lead to developmental learning

However, a condition for developmental learning is that people are supported and guided in undertaking their developmental work tasks to ensure that they do in fact become opportunities for learning. So, for example, while an appropriate amount of stress is conducive and indeed necessary for learning, too much stress, brought on by overwhelming tasks or too much uncertainty, can block learning. Good management and leadership is necessary to ensure that work is planned in a way that people are stretched but at the same time are able to cope with demands. In this regard, support for planning and reflection is essential. This means that people have space and time to reflect on their work in a learning mode, through receiving supportive feedback on how they are doing – both positive and negative – and receiving training, coaching and guidance as a regular part of their work. From an organisational learning point of view, reflection activities need to take place in collective learning settings so that people can engage in finding common meanings in making sense of the collective work they are doing.

2.4 The implementation of learning organisations raises serious challenges for vocational education and training and human resource development actors

The wide and complex notion of learning that is implied in the concept of the learning organisation draws attention to issues that are normally considered to be outside of the realm of education and training, such as how organisations are designed, developed and managed. Indeed, the very concept of 'organisational learning' is foreign to the vocabulary of most of those involved in vocational education and training, for whom learning is very much a formal, individualistic matter. But, it is argued that vocational education and training must engage more with learning in untidy social environments in, for example, small enterprises and in different sorts of socio-economic 'real-life' contexts. This is a more complex and unstructured form of learning dealing with the relationships between organisational innovation, technological development, business strategies and the harnessing the skills and winning the commitment of everybody involved. Organisational learning is about applied learning and supporting 'practices' where 'non-professional learning' actors – managers and team leaders – promote learning while people are working. All of the professional education and training actors concerned with the business of work-related learning have to rethink their positions to respond to the challenge of organisational learning. This entails a re-evaluation of vocational education and training but also human resource development practices and strategies.

In addressing the organisational learning agenda there is also the need to examine how those representing the respective fields of vocational education and training (VET) and human resource development (HRD) can learn from each other and cooperate with each other. Whereas VET - in line with its public sector role - is at the intersection between peoples' concept of their individual professional or occupational identity within society and their organisational roles within companies, HRD is focusing more on promoting the effectiveness of people within particular companies. Likewise, whereas HRD has more of a bias towards management development for business effectiveness, VET is more concerned with the needs of intermediate level workers. Also, the traditional obligations of VET tend to be restricted to foundation level professional/vocational education ('initial vocational education and training') and not so much 'continuing vocational education and training' throughout one's working life.

In the context of promoting a European learning economy (See Lundvall)or and *Making a European Area of Lifelong Learning a Reality* [2] there is a need for radical thinking about how VET and HRD can interconnect with each other. This calls for boundary crossing and mutual learning in a 'social partnership' mode leading to a realignments of respective roles in addressing a much wider and more complex learning agenda in which change is introduced in a bottom up and pragmatic fashion and not in accordance with some grand 'top-down' theoretical or ideological framework. The position adopted by research professionals within VET and HRD cannot be a purely objectivist and detached but rather must take on the form of an engagement with policy makers and actors in jointly building new constructs.

Another and perhaps more important point that needs to be taken up is the fact that in the more innovative organisations focusing on 'knowledge-value-added' products and services, the HRD and education and training departments in these companies are tending to miss out on key organisational debates about knowledge development and knowledge management strategies.[3] This can be seen as 'wake-up call' for HRD professionals, in particular, to begin to address more the 'intangible' dimension of an organisation where knowledge (or intellectual and social capital) cannot be pinned down in line with traditional learning or training classifications, but is distributed throughout the heads of the different people who are creating and/or 'holding' it.

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[2] Communication from the European Commission (November, 2001)

[3] CIPD workshop (London 2001) on work-based learning.

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Individual paper:

Vocational identity and working conditions in the sector of tourism: The views of vocational education teachers.

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Abstract

This work is presented within the framework of the research "Vocational identity, flexibility and mobility in the European labour market" (HPSE-CT-1999-00042), funded by the 5th Framework Programme of the European Union. It attempts to analyse the notions of work that vocational education teachers in the field of tourism have, both in relation to their work as teachers and to the profession for which they are training. We want to find out what is the impact of these notions upon the images of profession that they portray to students in their schools, particularly in a sector which demands flexibility on the side of workers; in which there is not a long tradition in formal vocational education and in which there is a strong appeal in the region for its contribution to the economic growth. The result is a labour market with great mobility.

What are the identity features of vocational education teachers? Our analyses will be based upon the replies of these teachers to a questionnaire, which interrogates the following points: work trajectory, vocational call, VET's views, relation between labour market and VET, teachers work as teacher and career expectations.

Introduction.

Vocational training of young people cannot be based only on providing them with professional competencies. Teachers have to prepare their students for the continuous changes in the workplace and the conflicting demands of the labour market. This is of particular importance in a sector like tourism, where these demands are as important as the need for particular competencies.

Teachers can adapt their training to these demands thanks to their experience of the sector in previous or current work activity, as well as by continuing training. All of these will be embedded in teachers vocational identity, an issue which has been hardly studied, even less in the case of vocational education teachers.

This research its within the framework of a wider research project ('Vocational Identity, Flexibility and Mobility in the European Labour Market', financed by the 5th Framework Programme of the European Union -contract number HPSE-CT-1999-00042-, acronym FAME). Its focused on the relations between different agents in this sector (employers, employees and students[1]). But this paper is focus is how the work of teachers as teachers and their knowledge of the sector have an impact upon their vocational identity, and how they perceive the demands on flexibility and mobility.

What are the key identity aspects of this teacher group? To answer this question, we have prepared a questionnaire addressing the following aspects: previous career and expectations, initial and continuing education, working conditions and teachers' image of the profession they are training for. Of particular interest to us is the relation between their identity as teachers and their identity as the professionals they are and for which they are training: that of the tourism sector.

We have also paid attention to the training they have to undergo in order to carry on their work as vocational education teachers: their experience and knowledge of the sector, as well as their pedagogical background. We will show the relation of their training careers to their working conditions and those of their colleagues. Finally, we intend to see how these careers and working conditions and their notions of work have an effect on their career prospects and their further development and training.

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[1] If you want to know more information about these parts of our work in the project, see papers presented by Fernando Marhuenda, Almudena Navas and Ignacio Martínez at the ECER 2002.

General aspects and initial education

The questionnaire has been sent to all the teachers working in the formal vocational education and training system (VET from now) at the tourism sector in the Valencian region. There are 7 Formative Cycles, 3 of them are Medium Level and the others High Level. Questionnaires have been sent to 16 schools (12 state, 4 private) with VET in the tourism sector. That means a 205 teacher population. Only 49 of them answered the questionnaire (approx. 25% of all teachers in the sector) from 13 schools, mainly public. Other features of this population are:

- 50% of them are women, most of them from private school.
- 60% are aged between 30 and 45 years old -(in charge of placements; there isn't difference by sex, and the older are teachers who have more responsibility).

About their initial education, 17 teacher have a university degree; 12 graduate, 1 technician on engineering and the others studied (19) VET (level 3). Nearly the double of women has studied in university; a bit more than the 50% of men have studied VET level 3. These data are referred to the higher level of qualification, but we have to point that there are 9 teachers who have studied other studies. So totally, there are 25 teachers with a professional training relevant for the tourism sector. And if we consider Languages Studies, there are 9 teachers more.

Most of the teacher teaching students to become professionals in the sector of tourism, but most of them doesn't have any experience how professional. So, we want to know what are their notions of work (their own and work on the sector) and what are the effects on the notions their students will develop. So, we'll development the following questions:

- Work trajectory
- Vocational call
- VET's views

- Relation between labour market and VET
- Their work as teacher
- Career expectations

Work trajectory.

These might be based upon: age to begin working and how they get it; years of teachers experience; sector experience; if work in others fields (paying attention to those working at this moment in tourism sector); and, if they belong to trade unions.

It's meaningful for us that 42 teachers started working before the age of 23, but in the case of women, they entered later on to the labour market. A possible explanation could be based on the kind of studies carried on by women. As they were holding longer university careers they stayed longer training. So, our explanation passes by entering later on the labour market due to a longer training.

We can point two different ways of access to the first job: through personal contacts (family, friends,...) through employees selection (interview, *curriculum vitae*,...).

About their experience as teachers there are 12 of them who have less than 5 years. Even so, in the case of teachers who have less than 5 years in their current school, the number increase to 27. We can remark as well those 6 teachers who have more than 20 years educational experience, and 4 of them in the same school. Teachers with more experience, have some hierarchical responsibility in the school.

Other work trajectory aspect is if teacher has experience in the sector. There are 16 teachers who have had experience in tourism sector. There are more men than women who have moved to the educational sector from the tourist one. In the women case, the mobility is bigger than men's mobility referring to the educational sector (working as teacher in several schools, having different responsibility inside the schools).

We can remark that now there are 11 teachers mixing theirs teaching in current school with others working out of in other fields. The most of them are men and pertain to state school. 6 of them mixed their current work with work in the tourism sector. In this paper we will talk about them because they know the sector reality and they can help us to know differences between school and labour market fields. As we will explain later on they have different notions about labour identity in tourism sector.

Other features about these teachers are the benefits they obtain by working in the tourism sector. These are: they are able to explain their students the profession reality; bring into the school the enterprise resources; knowing closer the sector than the other teachers. In the other hand, working in the sector is not used for taking charge of students' placement.

The last work trajectory aspect's we development now is if teachers are member of trade unions. From the 49 teachers who answer questionnaires, 22 teachers belong to a trade union or to a professional association. And 16 of them belongs to state schools (14 are men). We find mixed positions. For instance two teachers belong to both aspects and in the other hand, teachers associated to professional colleges need this association in order to work.

The reason to be in a trade union or collegiate we can mention two of the list we gave them, selected by 10 teachers in the questionnaire: (i) they think it is the right place to receive a collective defence of teachers interest; (ii) due to the information they receive from the sector. The reason occupying the third place on the selection (choosed by 5 teachers) was the possibilities of continuous training.

Now that we have see their work's trajectory, we will focus on their vocation. We do think that there is some trend specially important in order to talk about the vocational call of the teachers in the tourism sector.

Vocational call

We will focus in the main areas: (i) the reason why they choosed the tourism sector, (ii) and the reason why they choosed to be teachers.

27 teachers choosed their speciality due to the "vocation for work in sector" they feel. The second option more choosed (but only by 8 teachers) is that "they like this family sector". The third option choosed by 6 teachers: "Is a profession it can improve society". Other 4 teachers, because "their family work in sector".

These 4 teachers are those who work in professional activities in the sector and two of them are nowadays mentors in enterprises. So, if we say before that 6 teachers were working in the sector, and we know that 4 of them works in family business, two of them choosed this sector by the second option (they liked the speciality).

In order to circle teachers who are closer to the labour market world, we emphasised our analysis on teachers who were mentors in the enterprise. Even if they don't have a real work in the sector, being a mentor they get a direct contact by tutoring their students. Thus, in some sense, they know by first hand the sector. In our population requested, only 12 of them had a vocational call and were mentors.

Their vocation towards tourism does not seem to have a relation with their role as being in charge of placements.

Talking about their vocation as teachers, 16 teachers of those who had a vocational call for the tourism sector have as well a vocational call to be a teacher. If we count the full teacher's population 21 have vocation, and 16 choosed to become a teacher because they like to work with young people. There are as well another 16 teachers that are mentors. Finally, 3 teachers from the group of teachers who works in the sector have vocational call as well.

VET's views

Asking teacher about the weak lines of VET today, 16 of them complain about the obsolete equipment and the lack of budget . Secondly, they complain about the 'lack of professionality' and 'lack of vocation' (8 teachers). Both answers are mostly from state schoolteachers.

We may remark that 7 teachers consider the length of VET too short to provide quality training, but in this occasion, a vast majority of this do work in private schools. The final option to sign is that only 5 of them complain about the students, the lack of motivation, interest and training of students. The last data, is meaningful for us due to the reason that teachers don't perceive the student's lack of motivation as one of the problems from VET. As we can see in other paper presented by Navas in this same conference students are highly motivated through tourism sector, and through the training the sector. So, for these teachers the weakest line of VET is related to their own teaching conditions, vocational and curricula aspects.

Relation between Labour market and VET

28 teachers consider VET is aware and respondent to labour market need and 16 consider that curricula are obsolete and not attemptive to the context.

There are two questions to remark: those who hold responsibility posts in the school tend to consider VET respond to labour market need, but teachers who work outside school don't think so, because 5 of 6 think that VET don't respond to labour market need. They even consider that curricula aren't update. Men have the more negative vision on that, maybe because most of them are working on the sector as well as a teacher.

We emphasize the teacher's opinion that is now working in tourism sector as we say at the beginning of the paper. These teachers are in contact with school reality and labour market reality, overmore they can see differences between two reality, for example, they think VET curricula fits better to the labour market.

Their work as teachers

In general terms, teachers are satisfied with their teachers' work. There are 9 teachers who affirm that they aren't satisfied refer to external reasons (resources and scholar assessment of students).

Half of teachers' (25) are attached to their work as teachers due to the formative action, education and training of young people. We can remark as well that just 3 teachers talk about the working conditions (wages, the autonomy and the holidays). Normally, these trends are used to criticise the 'good situation' the teachers live, which justify their low social consideration.

We are interested in knowing the what of the attraction of teacher to this profession but by being teachers of this profession. 3 of them mark that their interest lay on the formative action, and to be trainers of young people. The other 3 talk about: A "Satisfaction to do a good work"; they are passionate by the subject; and "the wage, the autonomy, the holidays and the working hours", respectively.

In the other hand, what they like the less, is the lack of motivation and the lack of discipline in students (15); and 6 teachers refer to schools conditions (lack of resources, the last educational reform is an uthopy) and other 6 talk about the relation with colleges. The last source of insatisfaction we want to point here is how is low teachers social consideration (4). In other hand, there are 7 teachers who affirm there is nothing that they misslike. If we attend to teachers who work outside school, there are 5 of them who mark the working conditions (wage, instability, bureaucracy, the lack of organisation, bad relationship with companions) and only 1 to the indiscipline of students.

As we say before, student's are highly motivated and students motivation it is not a weak subject for teachers in VET. But, if we ask them what is the thing the most they don't like to work as teachers, then they talk about students: their indiscipline.

Finally, 20 teachers are not able to disconnect of work. 6 of them think that it depends on the trouble of the moment. 4 of them never disconnect but because they like. The rest of them disconnect perfectly (16).

Career expectations

Most of them do not perceive chances to promote within the school system, that means, they will continue in teaching VET inside the same school. So, we can say they consider teaching as a 'flat' career.

If we take into account the career expectation of teachers, we can remark some few meaningful data:

- 29 of them have the will to improve their work and enjoy it.
- 2 of them are 'burnout' or will be in 5 years if they go on like now
- 1 is moving to start his own business in the sector
- 4 would move to another job in the sector of tourism (these belong to the group of the civil servants, so they have a good position related to other labour market careers in their sector, but even so, they have the willing to change something in their careers.
- More than the half feels overeducated in regard to the sector and pedagogies; continuing education is not highly valued.

We may notice that 5 of the 6 teachers working outside the school would choose go on with their work in the VET system and in the same school.

Some final ideas

Mobility and flexibility are features of tourism sector. Even so, in this research teachers of VET tourism family do not suffer these features. Teachers' career responds more to a flat career, because in teaching sector we can only talk about some different hierarchical responsibilities. Besides that teachers who have hierarchical responsibility in the school are those who have more experience in the school or in teaching.

But in the other hand, we can say that there is one type of mobility, we could named it "between-school mobility" (go from one school to other). In Spain there is a public examination, which it used by teachers who after win a post by public competitive examination and access to one centre, they can moved to other school. Generally that happen because teachers want to work near theirs own home or they want to go to another school because they had problems with colleges.

Then, if tourism sector there are a great mobility and teachers only have a little between-school mobility (overcoat at the beginning of theirs careers), we have an important difference. It is due to that identity of VET teachers could be different to the workers' identity of the tourism labour market.

On the other hand, even if we have to take into account all teachers' work trajectory, most of them do not have any experience as a professional. If they would have more experience related to the tourism sector (working in the sector or be mentors), they could understand better the sector features (knowing closer the sector and explain that to students) and besides they can bring into the schools the enterprise resources.

In conclusion, there are few teachers who have experience in the tourism sector (before they arrived to teaching) and less who nowadays are working in it. Thus, even if we take into account mentors, their professional identity will have more teacher sector features than tourism features. But it is necessary to remarked that there is an important number of teachers who have "vocation for work in sector" and "they like this family sector".

EVALUATION TRAINING SCHEMES FOR THE HARD-TO-PLACE

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This paper contains a presentation of a research study into Minimum Income Scheme programmes. This is an exploratory study, consisting of a deferred evaluation of the participants of these programmes.

The document is divided into the following sections:

- Minimum Income Scheme programmes (or M.I.S programmes) and the request for their evaluation.
- The characteristics of the evaluation.
- The results of the research study.

1. M.I.S. programmes and the request for their evaluation.

In Spain, M.I.S. programmes (or social wage initiatives) are programmes put into practice, under various different names, by the country's autonomous communities in order to ensure that the entire population has access to a minimum income[i]. The main reference for these programmes was the French state Minimum Income Scheme. They share the following characteristics (Aguilar et al, 1995, 61-2): a) they are benefits given to individuals, although they take the family unit or people living together as their reference; b) the selection criteria include an income below that of a certain scale c) they include some type of mechanism to limit mobility between autonomous communities; d) they are granted for a certain period of time; and e) the financial benefit is associated with some kind of activity to promote integration.

The emergence and development of these programmes have coincided with a period of intense development in European training and employment policies and programmes. This, together with the link that characterizes these programmes between the granting of financial aid and activities to promote integration, has led them to be closely associated with policies and programmes for the social and occupational integration of groups with special difficulties.

In the case that concerns us here, it was the *Consell Insular de Mallorca's*[*] Department of Labour & Economic Promotion that made a request for the evaluation of M.I.S. programmes. This department is responsible for the M.I.S.' training and employment programmes[ii], which form part of the *Consell Insular de Mallorca*'s Global Training and Employment Programme and they are co-funded by the latter and by both the Balearic Government and the European Social Fund.

The M.I.S. training and employment programmes are run by specialist non-profit-making bodies. Those admitted to the programmes have profiles consistent with M.I.S. participants, regardless of whether they receive benefit payments or not.

The initial request for evaluation included different aspects of the programmes and it was established that it would focus on the assessment of programmes submitted for potential funding by those bodies responsible for running them and on a deferred evaluation of the participants. In this paper, a presentation is given of the research study directed at a deferred evaluation of the participants.

2. The characteristics of the evaluation

This has been divided into three subsections. The first, most general subsection contains an outline of the objectives, methodology and stages involved in the research study. The second and third focus on specific aspects of the methodology used which were considered to be of special relevance within the context of the investigation: the population under analysis, the creation of groups and in-depth interviews.

2.1. The objectives, methodology and stages involved in the research study

The deferred method of evaluation of the programme's participants was chosen from among various different assessment techniques. With this evaluation system, the following goals were set:

- To determine the characteristics of the personal, family, employment and social situation of participants of M.I.S. programmes "n" months after leaving the programme.

- To pinpoint relations between the situation at "n" months and the situation on leaving the programme.

- To establish hypotheses regarding the possible influence of the programme on the development of each participant.

- From the results obtained, to draft proposals to improve M.I.S. programmes.

A qualitative methodology was selected, based on in-depth interviews with the chosen candidates. We consider that this methodology was the most coherent with our objectives. Furthermore, the results of the in-depth interviews would supply information that was sufficiently varied and plentiful to be able to obtain an initial insight into the realities that we wished to analyse, as well as raising possible new research problems.

The research study was organized into three stages:

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[*] A body belonging to the Autonomous Community of the Balearic Islands with authority over the island of Majorca

- Stage one or the preparatory stage: During this phase, the study's sample population was determined, data was gathered that would give us access to the said population, an interview script was drafted and the interviewers were given the necessary training.

- Stage two or the development stage: During this phase, the interviews were carried out and transcribed, an analysis was made of the content of the interviews and a report was made of the results.

- Stage three or the final stage: During this phase, the report was submitted to the body that had commissioned the study and to the organizations responsible for running the programmes, and a discussion group was formed to discuss and make contributions to the study.

Figure 1. The stages involved in the research study

Stages	**First. Preparatory**	**Second. The interviews and the processing of the results**	**Third. The submission of a report on the results and the holding of discussion groups**
Activities /Components	- The specification of the research project. - The definition of the study's sample population. - The definition of what information to obtain on the study's sample population. - The completion of record cards for each organization. - The design and use of a database. - The creation of groups. - The compilation of all the necessary information in order to gain access to our interviewees. - The creation of an interview script. - The training of interviewers.	- The interviews and their transcription. - An analysis of the content. - A report on the results.	- The submission of the report to the body that commissioned the study and to the organizations responsible for running the programmes. - A discussion and contributions to the study.
Tools	- Meetings with the body that commissioned the study and with the organizations responsible for running the programmes. - Meetings by the research team responsible for the programme in question. - Files on each organization. - A database - Training sessions.	- In-depth interviews. - The NUD.IST programme - The EXCEL programme - Meetings by the research team responsible for the programme in question.	- Meetings. - Discussion group.
Period	December 2000 to February 2001	February to October 2001	October to December 2001

2.2. The study's sample population and the creation of groups

It was decided that the study should focus on all those who had finished successfully the whole process of the M.I.S. programme during the period between 1999 and 2000: a total of one hundred and forty one people. From this total, thirty-five candidates were to be selected for interview (a number chosen due to the material resources available).

Because, from the very outset, we had opted for what was primarily a qualitative methodology, the selection process could not be a random one. Instead, out of all the possible candidates we had to select those subjects that we anticipated would be the most appropriate for our proposed objectives. Therefore it was crucial to be able to count on initial information regarding the study's entire sample population.

Data collection methods were agreed upon with the bodies responsible for facilitating information, and it was decided that each one would provide the following information on each subject: his/her first name and surnames, address, telephone number, date of birth, date of admittance to the programme, date when he/she left it, the reason for leaving it, a contact name from the primary medical care service indicating the medical centre or sub-service, whether the subject received M.I.S. benefit payments or not, the type of admission to the programme from the perspective of the subject's family status (a single person, a couple living alone, a one-parent family with children in the subject's care, a family with multiple problems), health problems, financial activity (employment with a contract, employment without a contract – indicating whether it consists of domestic service employment, marginal work, socially excluded or other situations-, housework and/or care of children, the sick or the elderly, unemployed, other situations to be specified) and any related observations.

Once all the information had been gathered, it was entered in a database for processing and analysis. A later section contains a synthesis of the results.

To analyse the characteristics of those people admitted to M.I.S. programmes, we decided to create groups following the classification system used for beneficiaries of M.I.S. payments (Laparra, Gaviria, Aguilar, 1995; Serrano, Arriba, 1998; Various Authors, no date; Nadal, 1998,1999, 2000a,b; Oliver, 1998) in a way that was coherent with the objectives of our research study.

Six groups were defined which would be used in our in-depth study. The groups were created using the following criteria: (a) the initial criterion was their situation on leaving the programme; (b) the second criterion was their family situation; (c) the third criterion was that the number of subjects derived from the application of criterion a and b should be sufficient for the formation of a group.

The following groups were created:

- Group 1. Single parents with children in their care, who had a job when they left the programme.

- Group 2. Subjects from families with multiple problems, who had a job when they left the programme.

- Group 3. Single people or couples living alone who had a job when they left the programme.

- Group 4. People with or without a partner, living in a family unit, who had a job when they left the programme.

- Group 5. People who left the programme because it came to an end.

- Group 6. People who left the programme to go on to another training activity.

Figure 2. The composition of the groups

Group	No	% of women	% of men
1.Single parents with children, who had a job when they left the programme.	30	100	0
2. Subjects from families with multiple problems, who had a job when they left the programme.	13	100	0
3. Single people or couples living alone who had a job when they left the programme.	15	46.7	53.3
4. People with or without a partner, living in a family unit, who had a job when they left the programme.	19	89.5	10.5
5. People who left the programme when it came to an end	24	79.2	20.8
6. People who left the programme to go on to another training activity.	10	60	40

For each group, except the sixth (which was considered the reserve group), seven people were to be interviewed. People from the sixth group would only be interviewed if seven people were not interviewed from any of the previous groups.

The selection criteria for subjects within each of the groups were as follows:

1.Random.

2.People who could not be contacted by telephone were not excluded. In such cases, the organization responsible for running the programme in which the person had taken part was contacted and attempts were made to locate the candidates selected by other means, including home visits.

3.Replacement candidates were the person immediately before the one selected and, failing that, the one immediately after the latter, and so on successively.

2.3. The in-depth interviews

Once the sample population had been established, we began to work on the characteristics of the in-depth interview. The design process for this type of interview requires a script with questions covering basic aspects, although it also makes it possible to go deeper into the matter in hand. This script was drafted using an empirical-rational approach, consisting of a review of research studies into M.I.S. and a discussion by the members of the research team regarding the adaptation of the content of the questions and the objectives of the investigation. In addition to the interview script, shown in Figure 3, a questionnaire was designed to be completed by the interviewer in order to gather additional information that would, on the one hand, facilitate the compilation and processing, in quantitative terms, of basic information such as subject's marital status, level of education or employment status and, on the other hand, allow any observations to be made that might be considered pertinent to the course of the interview.

The interviews were carried out by three fourth-year teacher-training students. Not only did they take part in the entire design process of the interview, but they also formed part of the research team from the very beginning of the study. They received specific training in qualitative interview techniques, centred on the funnel approach: a strategy that enables exhaustive data collection whilst minimizing superfluous information and avoiding conflictive situations that might arise during the interview.

The interviewees were assigned to an interviewer of the same sex in order to avoid any type of bias resulting from the interviewees' reaction to a person of the opposite sex.

The interviews were carried out in accordance with the previously established script, with a high level of interviewee collaboration. All were recorded and then literally transcribed and they lasted between 45 and 80 minutes.

To process the data, the content analysis method was chosen. This enables the internal structure of information to be revealed, under the principles of objectivity, systemization, manifest content and a capacity for generalization (Pérez, 1998), thus conforming to the proposed objectives of our research study.

Significant categories were identified by means of a subsample of five interviews. From these, an initial system of categories was created that enabled the other interviews to be codified. The final system of categories was composed of a total of 88 subcategories grouped into 12 categories.

Once the system of categories had been determined and all the interviews codified, the last part of the analysis commenced: the drafting of the reports. During this stage, the NUD.IST qualitative data analysis computer programme was used. The reports that the programme creates according to subcategories constituted the analytical basis for the final report. For this research study, six independent analyses were carried out, one for each typological group.

The processing of the qualitative data was complemented by an analysis of the aforementioned quantitative questionnaire and a descriptive analysis of information supplied by the organizations. These last two analyses were carried out using the Microsoft Excel computer programme.

3.The results of the research study

These are presented in three different subsections, which deal respectively with the characteristics of the study's sample population, the results of the in-depth interviews and an assessment of the results.

3.1. The characteristics of the participants

The total sample population was composed of 141 people, of whom 117 (82.98%) were women and 24 (17.02 %) were men. In general, the women are younger than the men. As regards age groups, it should be highlighted that 50% of the men are over 44 and 70.83% over 38. In the women's case, in contrast, 46.15% are 30 or under and 69.23% are under 38.

Their family situations vary a great deal and are heavily influenced by gender. The situation characteristic of a greater percentage of women is that of a single parent with children in their care (34.2%), followed by families with multiple problems (22.2%). The first of these groups did not contain any male member and the second had 4.2% male components. In contrast, most men (62.5%) are single, whilst only 6% of the women are.

Health problems affect slightly over a quarter of the population under analysis, with a more marked influence on the male population. 79.17% of the male subjects and 17.09% of the women suffer from some kind of illness.

M.I.S. benefit payments are received by 45.5% of the total, whilst 54.6% do not receive them. By sexes, 54.17% of the men and 43.59% of the women receive benefit payments, whilst the rest (56.41% of the women and 45.83% of the men) do not receive any.

The period of time during which people take part in the programmes is very varied, ranging from periods of under 3 months (23.4% of the participants) to over 12 months (13.48%). By sexes, the greatest differences can be observed in periods of under 3 months (24.79% of the participants are women and 16.67% are men) and in the 6 to 8 month period (17.95% of the participants are women and 33.33% are men). For the other intervals, the differences are minor (with a difference of around 1.5 points).

An analysis of the participants' characteristics in relation with the organizations responsible for the programmes shows the specialization of the organizations involved. From the perspective of the subjects' family situation, we must highlight a certain specialization in female one-parent families with children in their care (for three organizations they represent half or over half the total participants and, in one case, they represent 75%) and in single people (representing 88.9% of the total in the case of one organization and 66.7% in the other). As for age, there are five organizations in which half or over half the participants are under 31 (in one case they represent 100% of the total).

The organizations also tend to specialize in a certain gender. Five organizations have only female participants and there are another four in which over 65% of the participants are female. There are also two organizations in which men represent over 65% of the total.

3.2. The results of the in-depth interviews

The results of the in-depth interviews led to such a wealth of data that a synthesis of the results would mean that some areas of interest would necessarily be ignored. For this reason and because of the approach taken to the research study[iii], we used the framework of a discussion group involving the body that commissioned the study and the organizations responsible for the programmes. Different types of contributions and ideas were put forward, thanks to the interpretations reached and discussions held previously by each individual entity[iv].

The synthesis of the results that we present here is organized into four sections, focusing respectively on the typologies of the participants, the experience of taking part in the programmes, their employment status, their personal, family and social status, and future perspectives.

The typologies of the participants

Different typologies can be observed when the participants join the programme initially: a loss of income that the "male family head" formerly provided, emergence from some kind of problem (e.g. disintoxication, a detention centre for minors), illness (e.g. obesity, alcoholism) etc. These different typologies are closely linked with age and gender. In the case of men, admittance to a programme is associated with health problems (e.g. addictions, obesity) and/or release from some kind of internment (from a detention centre for minors or from prison). There is also the case of an immigrant who had initially regularized his situation, but who became involved in a very problematical situation due to difficulties in settling down in his new country. This case is significant because an increase can be anticipated in this type of situation, probably accompanied by greater social problems than those of the case in question.

For the women, the situations involved are far more varied. Sometimes they are women from a problem-free background until, for a number of different reasons (separation, illness or others), the income provided by the family head is no longer available. In this group there are women with small children in their care and women with older sons and daughters.

There is also a type of woman from a poor background who has not broken out of the circle of poverty. These women live in situations of social and financial hardship and sometimes admittance to an M.I.S. programme is regarded as yet another requirement by the social security if they are to receive any benefit payments. For some participants from this group, taking part in the programme is an important means of beginning or continuing the progress of regularization.

There is another group of women in an intermediate situation with specific personal problems. This is the group that is most similar to the men. Often, however, because they are women, the problem is more acute: e.g. greater difficulty in access to employment, more precarious jobs and children in their care.

Membership of one typology or another is a determining factor in the participants' personal future prospects and in the conditions of their social and professional integration. Indeed, some organizations have become specialists in certain typologies and others have acquired a certain degree of specialization. A detailed analysis of the typologies of the participants should be carried out as a fundamental factor in the design, management and assessment of programmes. This analysis would facilitate the progressive development of intervention models adapted to suit the different typologies.

The experience of taking part in the programmes

Generally speaking, the experience of taking part in a programme is considered to be a positive one when different aspects are analysed, i.e. the training given, the people with whom they associated and changes arising from their admittance to the programme. However, all these different aspects include certain elements that require analysis and improvements.

In relation to the actual training, aspects that require further reflection include the relation between theory and practice (e.g. in the search for employment), the relation between workshop employment and productive employment, the relation between the professional training available and the subjects' previous professional background, the degree to which education is personalized (things students already knew, things they did not know and would like to have learnt etc.), the use of resources outside the programme itself (to facilitate specific types of learning like English or to continue aspects learnt during the programme) etc.

As for the professional staff involved, what is most valued is the personal support and assistance given in moments of hardship. Often a particular person is referred to (the social welfare officer in charge of the case and/or a professional from the programme itself) with whom the participant got on especially well. The subject arose of the professionals' difficulty in handling certain situations due to the characteristics of the participants. There was also the occasional case of a breach of confidentiality.

Opinions on the other fellow participants are very diverse. In some cases, a special mention was made of certain fellow partipants' lack of respect towards the interviewee. Also mentioned was the belief that there were people in a worse situation than that of the interviewee, preventing the latter from feeling at ease in the group. In some cases, taking part in the programme has had the added benefit of a good, lasting friendship that has come to represent a big support.

As regards changes arising from participation in the programme, the following areas should be emphasized (a) an improved sense of self-esteem and self-confidence that helps them deal with situations better (b) improved personal and social habits (punctuality, constancy, adherence to rules and regulations etc.) (c) the establishment of friendly relations with people from the programme, both professionals and fellow participants (d) training and support in their integration into the labour market. Although the former situation is the most habitual, in some cases participation in the M.I.S. programme was indicated not to have led to any notable change. An in-depth study must be made of such cases. Our hypothesis is that this is the case of people for whom participation in the M.I.S. programme was regarded as yet another procedure laid down by the social services in order to apply for benefit payments and that, after completing the programme, there has been no significant improvement in comparision with their initial sitution on admittance to the programme.

It has also been observed that sometimes, although the interviewee declares that no changes have arisen following their participation in the programme, from a global analysis of the interviewee's answers, it seems that the situation has improved.

The participants' employment situation[v]

The participants' employment situation varies, but most commonly it is characterized by frequent changes in employment, by short-term contracts and by hidden economy employment. These are not unusual situations, but instead they are features of the current labour market, in particular that of the Balearic Islands. And, more specifically, they are characteristic of jobs in sectors with a workforce that is predominantly female requiring few training requirements. The prime example is that of a cleaner, in most cases in black economy conditions.

In the case of the female participants, the activities they do are very similar to those carried out by other women who do not necessarily find themselves in a particularly problematical social situation. What varies, in this case, is the social support received by the women who do this work and the fact that these activities are their only source of income or, if not, their prime source. Thus these are situations that are beyond the women's own control and beyond that of each individual programme.

Nevertheless, there are also other situations (a) women who do not have a remunerated job or who work very sporadically because it is incompatible with childcare (b) women who are currently out of work because a contract has recently come to an end or because they say that they cannot find work (c) women engaged in marginal forms of employment, collecting scrap metal or selling things in the street (d) men and women who are unemployed because they are ill (e) men and women who, after taking part in the programme, have been readmitted to it or have been engaged to take part in an employment workshop by the same organization (f) men and women with relatively stable jobs.

Of all the people interviewed, for personal reasons there are some who are not expected to be able to meet the demands of the labour market. Among these reasons, the main motives are health problems, since they often prove to be an obstacle in finding and holding down regular employment. The study clearly shows that ill health is both the cause and effect of employment problems. Depression, anxiety and a low self-esteem are some of the effects of unemployment, whilst at the same time they also make it more difficult to find a job. However, certain illnesses, such as psychological illnesses, addictions and obesity, are in themselves clear obstacles when trying to find regular employment. Health problems affect part of the interviewees, but they can also affect their relatives (their partner, father or mother or children).

The people with the greatest difficulty in finding regular employment are characterized by widely differing situations: some do sporadic minor jobs, others are involved in an employment workshop[vi] and others live with their families. A way must be found for these people to live a decent life, regardless of their level of productivity. This does not mean that they should renounce their right to work. Instead it should be made possible for them to do some kind of work that assists their social integration, rather than assigning them a job that exceeds their capabilities.

Groups 5 and 6, (people who left the programme when it came to an end or who went on to do another training activity when it concluded), contain a substantial number of participants in the above situation. Very probably the same circumstances that prevented them from finding work at the end of the programme were also the cause of their continued unemployment at the time of the interview.

Specific work in conjunction with companies, together with monitoring and support in the search for work and in its maintenance, should become an integral part of the M.I.S.

programmes. Further steps must also be taken to create special companies to promote and assist integration.

Personal, family and social situations.

The participants' personal situations are characterized by an enormous vulnerability[vii]. This is the result of their labour market status, together with a lack of family support and an inadequate system of social support given the current social realities (e.g. social benefits channelled through salaried employment, insufficient public services for childcare and care of the sick or elderly, very expensive housing, a lack of policies to ensure sufficient income for one-parent families and a shortage of primary school grants or free school meals among other things).

In the case of young people who are not yet independent, but live with family members whose situation is normal, they can be made less vulnerable if they receive support from family members. These people are admitted to programmes because they have specific problems (e.g. mental problems), because the town where the programme was held offered no other other alternative or because the participant was unaware of it. These people were not the recipients of benefit payments.

In other cases, we find people living in situations of social exclusion[viii]. Sometimes these are people born into an impoverished family, who have failed to break out of the circle of poverty. On other occasions, the origins or reasons that have led to their current situation are not so clear. The common denominator is the fact that they have children in their care (these are families that normally have two, three or more children). Sometimes they are women living with a partner or else they are the female head of a single parent family. When they live with their husband or partner, the latter is unemployed or works very occasionally for reasons that may vary. Often the reasons remain unclear throughout the interview, but they tend to be associated with an illness and/or with problems related to immigrants from outside the EEC.

In the case of women who are the head of a single parent family, no income is supplied by the father or fathers of the children in their care. In some cases, there are children living with the father, with a relative and/or as a ward of court.

Money is scarce and very often insufficient. The worst situations arise when there are people in the subject's care and usually social support is depended upon in the form of food, grants for childcare, clothes etc. Some of the interviewees complain about the lack of social support. They indicate that even though they apply for many types of support, they are not given any or it is insufficient.

The situations involving the least financial hardship correspond to those of men living alone or with a partner without children in their care, or unemancipated young women.

Paid work can be accompanied by housework and looking after people in the subjects' care, particularly in the case of women. Unemployed women also devote a large part of their time to housework and childcare.

Apparently unemployed people without family responsibilities do not do any specific type of activity. These are people with extra problems, often some kind of illness.

Activities like watching the television or resting are some of the most common ones during the subjects' free time. There is one case of a keen reader and of the creation of an association.

Another typical factor is a lack of relations. Although relations with people outside the home are closely connected with age and family responsibilities, a sense of isolation and of having few friends is a general feature of the people interviewed.

Improvements in their personal situations necessitate avoiding former friends and making new ones, particularly when an addiction was involved. The difficulties found in doing so increase their sense of isolation, which is also heightened by other personal characteristics such as obesity, some kind of deficiciency, homosexuality or hermaphroditism.

It is also common for the family or part of the family to live outside the island. In general, their financial and/or personal situation only permits occasional contact by telephone with very rare visits.

Sometimes there is a friend or relative to whom they can turn. However, often the professionals from the programme are the ones they say they would turn or do turn to in situations of hardship. As indicated in a previous section, in some cases they have also made a friend from among their fellow participants.

Young people without family responsibilities or additional problems are observed to say that they have more friends. These are people who reflect a greater desire and more potential for making friends. The reasons are undeniably attributable to age and to a personal situation that allows them more free time.

Conflicts with other people (neighbours, other members of the programme, relatives etc.) are a constant, often creating added problems and making social integration more complex.

The training syllabus of M.I.S. programmes must include work on relations with other members of society, in such a way that one of the programmes' basic objectives is to help encourage, recover and/or maintain social and family support.

Within this same context, it is also vital to raise issues in an explicit way related with the sexuality of the participants, particularly the female ones. Something that plays a determining role for women is the fact that no clear separation is made between sexuality and reproduction. Very often we find very young women who already have children, sometimes up to four or five. In some cases the children have different fathers. On exceptional occasions, some may be in the father's care, but in most cases they are with the mother. This is a common denominator of many of the poorest homes.

A form of sex education that clearly raises the issue of the relations between sexuality and reproduction is crucial. Having children is one option but it is neither the only one nor is it always the best alternative. A love affair need not be synonymous with the conception of children as a result of the said relationship. Education that encompasses relations with partners must form part and must be given pride of place in the M.I.S. programmes' explicit syllabus.

Another important aspect is access to housing. Those interviewed normally live in rented accommodation. These are properties with relatively low rents because they are either council accommodation or very old houses in bad condition. In some cases, the owner of the property does not demand on-time payments because he/she is aware of the situation or because there is some kind of exchange of services (caring for a person in exchange for accommodation).

Very often the houses are old and very delapidated. Despite this, some are extremely well cared for. Sometimes, they lack basic services like a bathroom, running water or electricity. There are two cases of people squatting in a derelict hotel.

In the case of women whose children are wards of court, they have a type of obsession with the idea of having in a home in good sanitory conditions with sufficient utilities, as this is a requirement of recovering the custody of their children.

Living in an owned property is very uncommon. This mainly occurs in the case of young people who still live with their family.

Future perspectives

Most are optimistic about the future. The future is often regarded with a view to their children (when they have some in their care), or with regard to work, health and housing. The future is not a mid or long-term one but a short-term affair. What concerns them are day-to-day affairs and how to cover their basic needs. One worry that is particularly evident is the possibility, at a given moment in time, that they may be unable to work for some reason, mainly because of the repercussions on the children concerned.

Young people without children in their care are more concerned with earning enough money to be able to achieve independence from their families. In some cases these are people who would like to live alone and, in others, they wish to form their own family.

On occasions the situation is faced with extreme pessimism. There is one case that stands out of a person suffering from an illness (unspecified) and from depression who clearly states that he/she does not wish to continue living. There are also some cases in which the precarity of their employment situation and the lack of family and/or social support leads them to expect that the situation will worsen. Usually this potential situation is not confronted, but instead the topic is avoided.

3.3. An assessment of the results

A fundamental aspect of the results of the investigation is their assessment in relation to the objectives of the study and their evaluation in the light of knowledge acquired from the research study.

With regard to the first point, the study's exploratory nature meant that from the very outset the explicit objectives of the investigation (listed in section 2.1) were envisaged as goals that would not be met during the course of this first research study. Instead, they would act as a reference, so that knowledge could be built up which would subsequently allow us to determine the basic variables and examine them in depth.

From knowledge acquired as a result of the research study a series of issues were raised which we consider to be of fundamental importance if the objectives posed are to be explored in greater detail. These issues can be grouped into the following areas: (a) systems of data collection (b) the sample population and research methods (c) the relations between the results of the research study and improvements to the programmes.

Systems of data collection

The gathering of data on the sample population, which was carried out during the preparatory stage, highlighted the need to use data collection systems. Because each organization has its own data collection system and there is no unified database, this hinders data storage and analysis. This situation forced us to create a specific database for the research study and only to work with information that we considered essential which the organizations could undertake to supply from their own records. In some cases, they were unable to provide certain information on a number of the subjects because it was unavailable and, in other cases, the data was less accurate than we would have wished, given the type of information that we aimed to acquire.

The processing of the database results and the submission of the research report to the different bodies highlighted the need for a more explicit description of the categories used during the data collection phase, as slightly different interpretations were observed for the said categories.

From all this, it is clearly necessary to set up a unified data collection and processing system which covers, at the very least, those items included in the existing database. In order for it to work efficiently, this system requires a shared knowledge of the meanings of the concepts used in the said database.

The sample population and methods used

The results of the research study pose new questions and lead us to reformulate some of our original ones, as well as encouraging us to re-examine the steps needed to make headway in such matters. Some of the aspects to explore and/or examine in depth have already been mentioned in previous sections, such as the typologies of the participants and teaching and learning processes (the relation between theory and practice, the relation between employment in a workshop situation and productive employment, the relation between the professional training available and previous professional experience, the personalization of tuition, the use of resources outside the programme itself etc.).

In addition to these we can also add, among others: adjustments between the target population and the population who take part in the programmes[ix]; indicators of success and failure; the relations between personal variables (sex, age, the family situation, health) and aspects concerning membership of the programmes (the receipt or non-receipt of M.I.S. benefit payments, the length of participation in the programme, the organization responsible for the programme) and the results.

In short, it is necessary to explore the conditions that lead to success or failure when participating in M.I.S. programmes and to examine M.I.S. intervention models. To do this, a combination of quantitative and qualitative methods must be used. In the first case, the systematic compilation of data described in the above section is fundamental. In the second, we consider that case studies, selected from amongst those already interviewed, would be an ideal instrument.

During a later stage, work with quasi-experimental models could be considered which would allow us to explore the influence of the programmes on those taking part in them.

The relations between the results of the research study and improvements to the programmes

Our analysis of the relations between the results of the research study and improvements to the programmes led us to reflect on the agents involved in both the study and the programmes, together with their interrelations.

The quality of the research study and its capacity to influence practical matters is closely linked with its conception and with the model used. As stated in other papers (Calvo, Salvá, 2001, Salvá, Casero, Oliver, 2001, Salvá, Calvo, Cloquell, 2002), participative research methods and co-evaluation strategies are the techniques that are considered to be most appropriate and they are the ones being used in different research studies for the assessment of programmes and the analysis and transference of good working practice (Salvá, Pons, Morell, 2000, Salvá et al, 2002). In this research study, we have followed the same system within the framework of the characteristics and conditions of the investigation in question. We should also add that, in the design of the research study, a specific stage was envisaged for the presentation and discussion of the results, as referred to in previous sections.

Likewise, in previous sections specific proposals are put forward to improve the programmes (education on relations between partners, education for the resolution of conflict situations, specialization dependent upon the characteristics of the participants etc.). However, there are other proposals that are often not considered "technical" proposals as such, because they affect policies of a more general nature although they also refer to aspects that are fundamental if progress is to be made. Among these we should highlight:

- The progressive adaptation of the social welfare system to bring it in line with current social realities (public services for childcare, the elderly and the sick, council housing and specific social benefit payments for single parent families with children in their care, among others).

- Labour policies that, within the framework of policies to promote equality (and taking into account the experience acquired regarding new sources of employment), attempt to revalue what are either traditionally female, marginal or socially unacceptable jobs, incorporating them into regularized systems of employment.

- Support for the development and experimentation into innovative initiatives that have been successful in other fields, such as micro-credits, systems of sponsorship or exchanges of services.

- The creation of a regulatory framework for companies formed to promote and assist integration, contemplating, at a bare minimum, the opportunity of operating as a transitional or end company.

- A specific support programme for single parent families with children in their care. This should be a programme that commences as a pilot or experimental scheme. As well as working with families in circumstances such as these, the prevention of pregnancy in young women must also be promoted.

  Studies within the field of M.I.S. programmes offer a privileged vantage point. At the same time, they also offer an opportunity for experimentation in innovative social policies. Studies such as these are a good way of working towards this final goal.

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Figure 3. Interview Script

1. The M.I.S. programme in which the interviewee took part.

- Reasons for his/her participation in the programme.
- Positive and negative aspects of the programme.
- The adaptation of the programme to his/her needs.
- The usefulness of the training received.
- Continued contact with other fellow participants and professionals from the programme.
- Proposals for changes and improvements to the programme.
- Differences between the programme and other training activities undertaken.

2. His/her personal, family, social and employment situation since leaving the programme.

Employment:

- Types and periods of employment:
- Maintenance of his/her original job. Promotions and/or staff rotation.
- Reasons for leaving a job (if appropriate). Voluntary/compulsory dismissal.
- Unemployment.
- The search for work.
- The programme's relation with the job/jobs undertaken.
- Any additional training.
- Other programmes.
- Possible financial benefits.

Social and family:

- Changes in social relations in general.
- Relations with the family, workmates, friends, neighbours etc.

Personal:

- Self-esteem and self-confidence.
- The most important changes during this period.

3. Current situation.

How time is occupied on a "normal" day

Work:

- Type and duties.
- Main activity.
- Terms of employment (i.e. a contract).
- Employment conditions (salary, timetable etc).
- Remuneration / independence.
- Working day.
- Stability.

- Training requirements.
- Desire to or intention of changing job.

Unemployed (=they do not work):

- Length of time.
- Reason.
- The search for employment. Ways of searching and activities.
- Source of income.

Expenses:

- Fixed expenses.
- General expenses.
- Sufficiency of income.
- Shared expenses.
- Savings.
- People in his/her care.

Personal relations:

- Relations with his/her family of origin.
- Relations with the people with whom he/she shares his/her home.
- Relations with workmates and superiors.
- Relations with neighbours.
- Relations with friends.
- Person offering support in whom he/she can confide.
- The stability of and changes in his/her group of friends.
- Relations with people of the opposite sex.

Leisure:

- How time is filled during the weekend or free time.
- Hobbies and leisure activities.
- People he/she does these with.
- Participation in civic events or associations (organizations, activities etc).

4. Future situation (personal, family, social and professional).

- Own situation in 1-5 years.
- Courage in facing up to new situations.
- Changes to be introduced and the means to do so.
- Any necessary external support.

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[i] The Balearic Islands were the last autonomous community to introduce this scheme on an autonomous level, although the *Consells Insulars* (or Island Councils responsible for each island) had created a scheme on an island basis. This is why, at present, the Councils' role in the scheme is fundamental and the autonomous government oversees aspects such as its general planning and co-funding.

[ii] The *Consell Insular*'s Social Welfare Department deals with the more global aspects of the scheme and, more specifically, with the benefit payments involved. It works in conjunction with the municipal social services.

[iii] The participative strategies used in the research study are characteristic of the investigative duties of the "Training and Employment" research team of the Department of Educational Science of the University of the Balearic Islands, to which we are attached.

[iv] These contributions have not been included in the text. The *Consell Insular*, the organizations in charge of running the programmes and the research group responsible for this study are working together on the drafting of the said contributions, which will form part of a specific document.

[v] The interviews were carried out between April and July 2001. The highly seasonal nature of the economy of the Balearic Islands means that the date when information is gathered is the most important variable in the interpretation of data, in comparison with economies with a lower degree of seasonality.

[vi] Employment workshops are combined training and employment programmes directed at unemployed people of 25 years of age or over with special difficulties in finding work.

[vii] This vulnerability is characterized by the precarious nature and fragility of both the employment situation and their social ties (family support and systems of social support) (Castel, 1995, García Roca, 1996).

[viii] In present day society, social marginalization or social intergration are mainly the result of people's and collective's employment relations, together with social ties (family support and systems of social support) (Euvrard et al, 1991, quoted in Laparra, Aguilar, Gaviria, 1996, 637). The socially excluded include the most underprivileged of individuals from the point of view of both financial income and family and social support. It is an area of "extreme exclusion and marginalization, inhabited by the most disadvantaged. Generally speaking, they lack financial resources, relations with friends or family and social protection..." (Castel, 1995, 29).

[ix] The use of programmes for groups with special difficulties by part of the target population as a means of finding employment is one of the results confirmed by an assessment of the said programmes (Erhel et al, 1996).

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Overcoming Barriers to Employment for Women

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Introduction and Context

This paper is based upon a LEONARDO project (1997-2000), designed to address a European Commission priority of combating the exclusion of those disadvantaged in the labour market. The project involves comparative research into the effectiveness of Returner courses in enabling women to make a sustained return to paid employment. Four European countries (France, Spain, Ireland and the UK) participated in the project and one of the aims was to develop guidelines for the design, content and delivery of Returner programmes. It is these guidelines and some of the methodological and practical issues associated with conducting Transnational research which constitutes the focus of the paper.

Equal opportunities is a fundamental European Union priority, and in 1997 the Amsterdam Treaty established the legal framework for EU policy for equality in employment and social inclusion. The discourse by the 1990s had changed reflecting a new understanding of the global labour market with the responsibility being located in the individual, and emphasis placed on improved employment opportunities, guidance and counselling rather than vocational skills and training (Brine, 1999). Thus major initiatives were launched to promote equal opportunities and combat exclusion. The European Social fund under its 'New Opportunities for Women' programme was the main funder of initiatives supporting women wishing to return to the labour market, and Employment NOW states that,

> Women experience high rates of unemployment, account for a disproportionately large percentage of those in precarious, poorly paid or part-time employment and remain under represented in the decision-making levels in the working world.

Participation rates of women in the labour market in the four countries involved in the research show considerable variation.

Differences in Participation Rates

	1989	1996
SPAIN	29.5%	32.2%
FRANCE	50.6%	52.3%
IRELAND	33.9%	42.8%
UK	60.9%	62.3%

Table 1: European Labour Force Survey 1989-1996 (Cited in Rubery, Smith & Fagan, 1999:55)

Gemmeke (1999) suggests that the rise in labour market participation is ascribed to the decrease in the birth rate, increased participation in education and the growth of the service sector which traditionally employs women. In the UK for example, service sector employment is expected to continue to rise from 46% in 1996 to 49% in 2006 (Labour Market and Skills Trends 2000). The increase in service sector jobs and particularly the increase in the opportunities for part-time employment, which Saunders (1997:13) asserts makes it 'easier to arrange work to fit in around other commitments', has encouraged female participation in the workforce. Another factor which may account for differential participation rates has been cited by Chishom (1997). She suggests that patterns of women's working lives and the extent of state support for working mothers are shown to vary enormously across the European Community. For example, in France the practice of taking a lengthy break from paid work for child rearing is uncommon, where social policies enable women to continue paid work throughout their lives or to take breaks with guaranteed rights of return. In contrast, Irish women with children have relatively low rates of employment and social policies which locate them in the home rather than the work place. Lack of childcare provision presents one of the major barriers for women returning to training and employment. It is cited by McGivney (1993) as a domestic constraint and in addition to the psychological constraints such as a lack of confidence and structural constraints such as lack of jobs and/or training. It is evident that if women are to be able to access training provision and participate in the labour market then these barriers must be addressed. The documented barriers/constraints informed the project aim of developing guidelines for Return to Work programmes in order that these programmes meet the needs of both women returners and employers.

The 1998 'Skill Needs in Britain' survey found that employers thought that there was a significant gap between actual and required employee skills. The most common deficiencies were computer literacy or knowledge of information technology and skills related to communication, team working and problem solving. The need for information technology skills is also cited by Rees (1995:6) in her discussion of skill shortages in the EU. She asserts that, 'the all pervasiveness of IT means that few workers will remain untouched.' Starting from the premise that these generic skills are important in terms of improving employability, the effectiveness of Return to Work programmes in developing these skills, constitutes part of the evaluation process.

The needs of women returners in relation to their access to and participation in the labour market, have been a focus for a number of other research projects in the UK. (Spencer and Taylor, 1994; McGivney, 1993; Michaels and Headlam-Wells, 1995). The data upon which their recommendations are based are derived from questionnaires and interviews with course providers and women returners. The LEONARDO research includes a similar approach, and in addition includes the perspectives of employers based in the regions where the Return to Work programmes are located. This additional perspective provides another dynamic to evaluating the effectiveness of Return to Work programmes and informs the development of the guidelines for effective practice in women's training.

Methodology

The partners in the four countries selected a short (10-16 weeks) foundation level and a longer (6-12 months) accredited Return to Work programme for evaluation. Whilst the programmes examined differed in terms of structure and content, all included the development of the generic skills identified above. Two differences which have however proved significant in the comparative analysis, relates to work placements and funding. In France, Spain and Ireland, work placements were an integral part of the programmes investigated, in the UK they were not. Also the UK differs in terms of funding. The other three countries have government and EU funding, the UK programmes did not. However these programmes were not necessarily representative of practices in the 4 countries involved.

In order to elicit the perspectives of the returners, course providers and employers, questionnaires and interview schedules were designed collaboratively at our Transnational meetings. These meetings provided the opportunity for mutual learning which Evans (1999:3) says requires,

> Researchers from the national contexts to form a team which constructs the discourse from the earliest stages of the inquiry, re-interpreting research questions and objectives and their meanings in the context under investigation.

In terms of our mutual learning, it was evident that we as researchers had come to the project with different experiences of conducting research. The French and ourselves had more experience with qualitative methods whilst the Irish and Spanish, more with the quantitative. This resulted in some interesting dialogues about the relative merits of the different research methods in relation to the project aims. It also resulted in the project manager having to translate back and forth in English and French!

One of these aims was to compare the experiences of women on Returner courses and we discussed the value of using both questionnaires and interviews as a means of exploring them.
In-depth interviews previously used in research with women returners (Smith 1996) were found to be a valuable way of enabling women to tell their own stories. They provided the space to explore issues of importance to the women themselves without a pre-determined agenda. The approach opens up the possibility to explore areas, perhaps not initially considered of major significance by those conducting the research, but bring a new and important dynamic to the research findings. On this point Anderson (1990:96) says,

> When women speak for themselves they reveal hidden realities, new experiences and new perspectives emerge...Interviews with women can explore private realms to tell us what women can explore private realms to tell us what women actually did instead of what experts thought they did or should have done.

A major issue which emerged in the interviews was the importance of confidence building and data related to this underpinned the guidelines discussed later in the paper. Whilst we as researchers were aware of its importance, it was almost a taken for granted assumption and not an issue we had considered addressing directly, either in the interviews or the questionnaires. We learnt much about its significance through the research process.

In addition to the discussions on the use of interviews, designing the questionnaires raised the issue of reaching consensus on the structure and content of the questions. We agreed to produce some common core questions for comparative purposes with the option of including questions which were specific to the needs of the programmes in the different countries. We produced two questionnaires for the returners, one to be used at the start of the programmes and one at the end. The initial questionnaire included biographical details and was used to select a sample of ten women from each programme in each country for in-depth interviews.

The common core questions for the end-of-course questionnaire, related to the development of the generic skills, the work placement and intentions on completing the course. These were used as a starting point for the interviews, particularly the discussions of the women's views of the usefulness of courses in preparing them for employment. Another key area explored in the interviews was any potential barriers to returning to work. In addition, the women were tracked at three-month intervals after the courses had finished, to determine whether the skills and knowledge they had acquired had been useful to them in seeking and securing employment. Face to face interviews were also conducted with course providers and a questionnaire followed up by a telephone interview with local employers.

Perspectives and Guidelines

Data from the end-of-course questionnaires was analysed to determine how effective the women felt the courses had been in the developments of the identified generic skills. Discussion will be limited to the longer courses as it is these that are most pertinent to the focus of the paper. The following table provides an overview of the women's perspectives on the value of the courses in relation to skill development.

	UK Women into Business and Management	**Spain** Management and Administration	**France** Executive Assistants	**Ireland** Return to Work
Update skills	☐	☐	☐	☐
IT skills	☐	☐	☐	☐
Communication	☐	☐	☐	☐
Team work	☐	☐	☐	☐
Supervisory skills	☐	☐	☐	☐
Presentation skills	☐	☐	☐	☐
Knowledge of organisation / companies	☐	☐	☐	☐
Language of business	☐	☐	☐	☐
Problem solving	☐	☐	☐	☐
Job seeking skills	☐	☐	☐	☐
Placements	☐	Placement 3 months per year.	2 months at the end of the course.	4 weeks at end of course.

Table 2: Value of Courses

In terms of skill development the courses had included the elements identified as a necessary preparation for a return to employment with the exception of certain skills in the French course and the lack of a work placement in the UK course. The French course 'worked very much in a school way' and did not utilise the types of teaching and learning strategies, such as groupwork and case studies, which promoted the development of team working and problem-solving skills. The lack of a work placement was a key issue in the UK course and some disappointment was expressed by the respondents that there was no attachment to the local industry,

> 'I'd imagined that people would come from local industry to talk about a related topic... I don't feel there has been this relationship with local industry. It has concerned me that there isn't that sense that they are quite close to local industry'.

The work placements in the other three programmes had been very positively evaluated particularly in France where the in-company training period enabled the trainees to build their self-confidence. One of the respondents said,

> 'This two-month training period gives us a chance of finding ourselves once again in a company context and gaining professional experience.'

The issue of confidence building feature strongly in the interviews with the UK and French returners and it was evident that much good practice existed from which guidelines can be derived.

For example, in the UK course the Communication and Presentation skills components were cited as being particularly useful in helping to build confidence. A trainee for example said,

> 'The Communication and Presentation skills were perfect for helping my confidence. At the start I didn't have confidence. I needed to rediscover the confidence that I'd lost.... Often we were given tasks to do in terms which helped us to come out of ourselves...One part of the course was a fifteen minute presentation and at the beginning we didn't think we'd manage it but everybody did, it was wonderful.'

The researcher responsible for collecting the data from the UK courses found that all of the returners mentioned the value of the course in relation to confidence building with comments such as,

> 'A wonderful course. It gave me the confidence to go on to other things. Before the course my confidence was at rock bottom.'

> 'The course increased my confidence. It made me appreciate how many skills I had gained through my previous work and life experience.'

This finding accords with the other research on the experiences of Women Returner programmes. Rees (1992), cited by Summerlad and Sanders (1997:56) argues that, 'there can be no doubt about the efficiency of returner programmes in improving confidence levels.' There was one story which was particularly poignant in terms of the potential of courses to build confidence and change lives. 'Emma' was thirty-four, she became pregnant at sixteen and left school before taking her exams. She married at seventeen and went on to have three children. She had never been in paid employment but had set up a tenants' association and was the secretary of her son's football team. Through the course she realised that she already had a range of useful skills and an aptitude for learning. She said,

> 'This course has been a life-changer for me. It gave me the confidence to believe in myself and to realise that I do have something valuable to offer. If it hadn't been for the course, I would never have gone into an office. I'd be doing cleaning…I really thought that I'd messed up my life getting pregnant so young, but now I can have a career and I've got nothing stopping me.'

Guidelines for good practice in relation to confidence building and skill development are already well-documented in literature (Coats, 1996; NIACE, 1991; Morris, 1993; McGivney, 1993, Thorsen 1993).
Our data corroborates with these recommendations particularly with regard to the identification of barriers to training and the use of co-operative, shared and experiential teaching and learning strategies.
These involve the use of team building events to develop organisational, interpersonal and problem solving skills. In addition we would include fostering an awareness of 'tacit' knowledge and skills acquired through informal learning and the provision of work placements to make the links between theory and practice.

Outcomes

Evaluation of the diversity of approaches led to the jointly agreed guidelines in good practice for programme design however our recommendations for the design and delivery of Returner courses are based upon the experiences of a relatively small sample of women. This raises the question of their generalisability beyond the specific geographical and cultural contexts in which the data was collected. In addition, Crossley and Broadfoot (1992) make the important point that policies and practices cannot necessarily be translated intact from one culture to another.

We would argue however that one of the values of comparative investigations of women's re-entry to the labour market lie in their potential to illuminate a reality of women's lives beyond a specific cultural context. That reality relates to the commonalities we found between the experiences of the women across the four countries. These relate to the domestic and psychological constraints referred to earlier in the paper. The guidelines for good practice provide strategies to address the psychological constraints. The domestic constraints however, require intervention at a policy level. Pillinger (1992:165) in her discussion of women's employment in the European Community asserts that,

> Their access to childcare, training and skilled jobs is …….constrained by policies that assume their dependence in the family, in contradiction to the economic demands for their integration.

The resulting Guidelines in Good Practice in Training and Good Practice in Companies have been produced in the languages of the research partnership – English, French and Spanish. These provide reference to effective practices encountered during the research in the European partnership of France, Ireland, Spain and UK.(A summary of these guidelines is attached)

The project outcomes have a potential contribution to make to European Equal Opportunities debates and initiatives. It is important that European research, such as this one, have ongoing funding to maximise the benefits of the outcomes. Further dissemination activities proposed would provide opportunities to consider transferability of the findings to new contexts and to develop training materials and approaches including on line learning to support women in their return to work. There would also be the benefit of applying these research findings to other disadvantaged groups who are experiencing social exclusion and problems in accessing employment. The over 50s is one such group who are seen as a resource to fulfil skill shortages and gaps, and to address the demographic trend of a declining number of younger people in the labour market (The Social Situation in European Union–2001). The good practice identified in this research could also be applied to employment training and retraining for this group.

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GOOD PRACTICE IN TRAINING

Programme Design

1) Clear identification of training needs by employers

2) Involvement of employers in design and delivery.

3) Provision of work placement.

4) Leads to Nationally recognised qualifications.

5) Flexibility of entry requirements.

6) Mentorship/individual tutoring and support.

7) Low fees, financial support and child care provision.

8) Exit interview to analyse skills and competencies developed on course.

9) Effective tracking system of past students.

Implementation

1) Individual action plans

2) Communication skills

3) ICT and e-commerce

4) Presentation skills.

5) Problem solving skills.

6) Job seeking/interview skills.

7) Work placement – relevant to trainee and employer.

8) Specific vocational skill development.

9) Language Skills.

10) Advice, guidance and counselling.

11) Mentorship/tutoring.

12) Assessment strategies which challenge learners.

Training Methods

1) Recognition and utilisation of existing skills and abilities.

2) Fostering an awareness of "tacit" knowledge/skills.

3) Individualised job seeking techniques.

4) Interactive methods

5) Group exercises – brainstorming and problem-solving

6) Role-play and oral presentation.

7) Use of case studies to focus experience outwards.

8) Team building

GOOD PRACTICE IN COMPANIES

Placement provision

1) Employers involvement in training programmes

2) Company have clear objectives for the placement

3) Placement seen as giving value for the Company rather than the Company providing a service

4) Small payment for Trainee as allowance for expenses incurred

5) Company develops a skills profile for the Trainee and then gives them priority for future employment

General

6) Induction for new employees

7) Mentor/Tutor support to help adaptation

8) Clear job/skills specification

9) Recruitment and selection arrangements which recognise Returners different experiences e.g. design of application forms

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EDUCATIONAL MOTIVATION AMONG ADULT STUDENTS OVER 40

by

Marja-Leena Stenström

ABSTRACT

Over the nineties, adult education has emerged, in Finland, as an increasingly important component of national educational policy and planning. As a result of structural change in trade and industry and on the labour market, lifelong learning has become an important principle underpinning educational policy. In addition to features of the postmodern society, adult education is being challenged also by an increasingly elderly age structure. The purpose of the presentation is to describe, drawing on the results of a questionnaire survey, educational aspirations and motivation among Finnish mature students. Subjects are adults over 40 (n=389) who attended adult education centres and apprenticeship centres in spring 2001. The results made it possible to distinguish between three groups with distinct levels of educational aspiration: subjects with high, moderate and low educational aspirations. There were differences among the three groups concerning gender, family situation, educational background, age, the degree of own initiative behind the decision to return to education, level of degree orientation, and appreciation of IT skills. The study confirms the fact that it is those most in need of education and training who are least motivated to go back to education, while those least in need of education and training are active students. In order to boost adult people's educational motivation we need knowledge that will help us to foster adult learning and develop teaching adjusted to the requirements of adult learners. However, education for the aging is not only about pedagogical solutions: upgrading outdated education and obsolete occupational skills is a social policy issue.

Introduction

As a result of structural change in trade and industry and on the labour market, lifelong learning has become an important principle underpinning educational policy. The adult education field has long recognised that people learn all their life. In addition to features of the postmodern society (Bauman, 1992; Beck, 1992; Giddens, 1990), adult education is being challenged by an increasingly elderly age structure. It is predicted that new entrants to the labour market alone will not suffice to meet its skills requirements (Eurydice, 2000).

In the 1990s, the concept of lifelong learning attracted the attention of policymakers around the globe. The European Union declared 1996 the European Year of Lifelong Learning, and government agencies in Europe and the United States have also produced policy documents (Departments of Commerce, Education and Labor ..., 1999; European Commission, 2002). It has been stressed that in a learning society, lifelong learning is the key to survival.

Participation in lifelong learning is dependent on the learning opportunities that individuals can access. A high quality of the lifelong learning process does not depend on a high volume of participation alone. Furthermore, measuring participation is a complex issue (participation in public and/or private, full-time or part-time education). However, it is possible to look at data on participation in adult (between ages 24 and 65) education and training in European countries (Appendix 1).

In the European survey, lifelong learning refers to persons aged 24-65 who answered questions about whether they had received education or training in the four weeks preceding the survey. The information collected covers all education or training activities irrespective of whether they are relevant to the respondent's current job. They include initial vocational education, further education, continuing or further training, in-company training, apprenticeship training, on-the-job training, seminars, distance learning, evening classes and so on (Eurostat, Labour Force Survey, 2002).

The results show that participation in lifelong learning is most popular among adults in the United Kingdom, the Nordic countries and the Netherlands and least popular in countries of southern Europe, such as Greece, Portugal and Spain, and also in France. Between 2000 and 2001, participation in lifelong learning has grown in Denmark, Finland, Spain and Italy but fallen in the United Kingdom, the Netherlands, Belgium, Greece and Norway. It seems that successful participation in adult education is largely dependent upon successful participation in initial vocational education. High educational attainment has a positive impact on employment rates. (Eurostat, Labour Force Survey, 2002.) Adult education has emerged, also in Finland, as an increasingly important component of national educational policy and educational planning (http://www.minedu.fi/17 Jan 2002).

The paper presents the results of a study of Finnish adults over 40, focussing on the educational motivation of those adult students who have been unemployed or are at risk of losing their job. The study covers only students in adult education centres and apprenticeship centres.

Lifelong Learning

Lifelong learning is a global strategy adopted in the EU as a basis for co-operation in education and training policies and for educating the individual. The European Commission has defined lifelong learning as follows: 'Lifelong learning is seen as encompassing all purposeful learning activity, whether formal or informal, undertaken on an ongoing basis with the aim of improving knowledge, skills and competences' (European Commission, 2002).

The continuous upgrading of skills is viewed as an investment in human capital, with lifelong skill development considered primarily an individual responsibility. However, there have been criticisms of the perspective of human capital. One way to categorise these criticisms is as follows (Baptiste, 1999; Hake, 1999; Oliver, 1999):

1. it turns education, hitherto considered a public good, into a private commodity;
2. it shifts responsibility to the individual and ignores the socially constructed nature of learning;
3. it overemphasises the instrumental and vocational purposes of learning to the exclusion of others;
4. it rewards primarily those learning activities that can show a visible and quick return.

An alternative to this is a vision of lifelong learning based on the theory of social capital (Schuller, 1998). Social capital is built through relationships based on trust and on acceptance of mutual obligations, social values and norms, while outcomes are measured in terms of social well-being. In contrast, in the human capital theory individuals construct their qualifications on the basis of economically rational choices, while outcomes are measured in terms of income, productivity and other economic indicators of success. Lifelong learning prepares individuals for a variety of life roles, whereas worklong learning focuses on preparation for occupational goals. The idea of adult education is that it is a voluntary activity, but the implication of the concept of the learning society is that lifelong learning is a duty, a moral obligation for any responsible member of society (Atkin, 2000, 225; Tight, 1999).

Adult learning can be classified into three categories (Cranton 1994):

- *Subject-oriented adult learning*. The primary goal is to acquire content. The teacher discusses the relevant material in the classroom, and the learners see themselves as gaining knowledge or skills.
- *Consumer-oriented adult learning*. The goal is to fulfil the expressed needs of learners. The teacher acts as a facilitator or resource person.
- *Emancipatory adult learning*. The goal is to free learners from the forces that limit their options and their control over their own lives. Emancipatory learning results in transformations of learner perspectives through critical reflection, in which the educator has an active role. Only emancipatory, more commonly known as transformative learning has been described as unique to adulthood (Merriam & Caffarella, 1991; Mezirow, 1991).

Although transformative learning has been found suitable for adults, the connection between adult learning and adult teaching is not clear. Of course, all adult education is not transformative in nature. It is known that transformative learning requires learners to address problems through critical reflection, while educators approach their own task by challenging learners to consider why they hold certain assumptions, values, and beliefs.

It is believed that adults must be taught differently from young students because life experiences shape the way in which people learn. The assumption is grounded on the theory of andragogy, which suggests that adult people expect learner-centred settings based on their life needs (Donaldson, Flannery & Ross-Gordon, 1993, 148; Manninen, Kauppi & Kontiainen, 1988). The question of different styles of adult teaching and learning is ambiguous. The type of instruction adopted in teaching adults depends on the purpose of the teaching-learning situation, the methods used, and the needs of the learners. Patterns of adult learning must be understood in relation both to the motivation of individuals to learn and to the context of the society in which adults live and work.

Adult Educational Motivation

Despite the fact that motivation both mediates learning and is the outcome of learning there is little research combining adult learning and motivation. Wlodkowski discusses motivation within the frame of reference of instructional arrangements, suggesting that every curriculum should include a plan for fostering motivation. Nevertheless, in the final analysis it is the learner who is responsible for their own motivation. (Wlodkowski, 1993, 3–4, 12, 15.)

A Finnish survey of adult education found that self-development and occupational development were the primary motives for entering adult education (Blomqvist, Niemi & Ruuskanen 1998, 39–41; Mikkonen 1996, 89; 1997, 114). Compared to 1990, as regards reasons behind decisions to return to education, unemployment or the threat of unemployment had become as important as the maintenance of occupational skills. Naturally, reasons linked with the achievement of a stable career featured prominently among the motives given by unemployed people for undertaking training. Aging foregrounded reasons related to self-development and occupational development, while motives associated with age, health, lack of adequate basic training and lack of interest became conspicuous among informants over 45. (Blomqvist, 1997, 38–39; Blomqvist, Niemi & Ruuskanen, 1998, 39–41, 45, 51.)

In the Finnish survey, reasons linked with age, health, limited basic education and lack of interest became increasingly important from the age of 45 on as obstacles hindering people from returning to education (Blomqvist, Niemi & Ruuskanen, 1998, 39–41). Similar barriers, such as lack of energy, lack of time and lack of motivation were found in an international comparison between Norway, Great Britain and Spain .

Age has been considered an important predictor of educational participation, participation in adult education being assumed to fall off with age (e.g. Cross, 1988; Merriam & Caffarella, 1990). Other predictors of educational participation are level of basic education and gender. A study by Tikkanen (1998, 79) discovered that when explaining participation in education, basic education and gender were more important factors than age.

Aims, Data and Method of the Study

The paper is a part of a research project dealing with adults over 40 in adult education (Stenström, Linnakylä, Malin, Nikkanen, Piesanen & Valkonen, 2002) commissioned by the Finnish Ministry of Education. The purpose of this questionnaire survey was to identify educational needs and examine educational motivation among mature students over 40 (Stenström, 2002; Stenström & Valkonen, 2002). The focus of the questionnaire survey was especially on those over-40 adults who were unemployed or at risk of becoming unemployed and who were attending adult education or apprenticeship centres in spring 2001. The research problems addressed in the study can be summed up as follows:

1. What are the educational aspirations and motivation of mature students over 40?
2. How are their educational aspirations manifested?
3. What factors promote and weaken their educational aspirations and educational motivation?

Over-40 students in adult education centres were sent 476 questionnaires, of which 270 were returned. Over-40 students in apprenticeship centres were sent 154 questionnaires, with 119 returned. The response rate was 62, which may be considered moderately good. The materials to be discussed represent a discretionary sample (n=389).

The answers were analysed using quantitative methods, among them factor analysis, cluster analysis and regression analysis.

Findings

Educational Aspirations and Motivation of Mature Students Over 40

Adult learning is usually motivated by the need to acquire a new skill or make a decision about one's career or life situation. The present study confirmed that the main focus of mature students' educational expectations was on acquiring new knowledge and skills. Their decision to return to education had often been triggered by changes in working life and the training needs that such changes gave rise to.

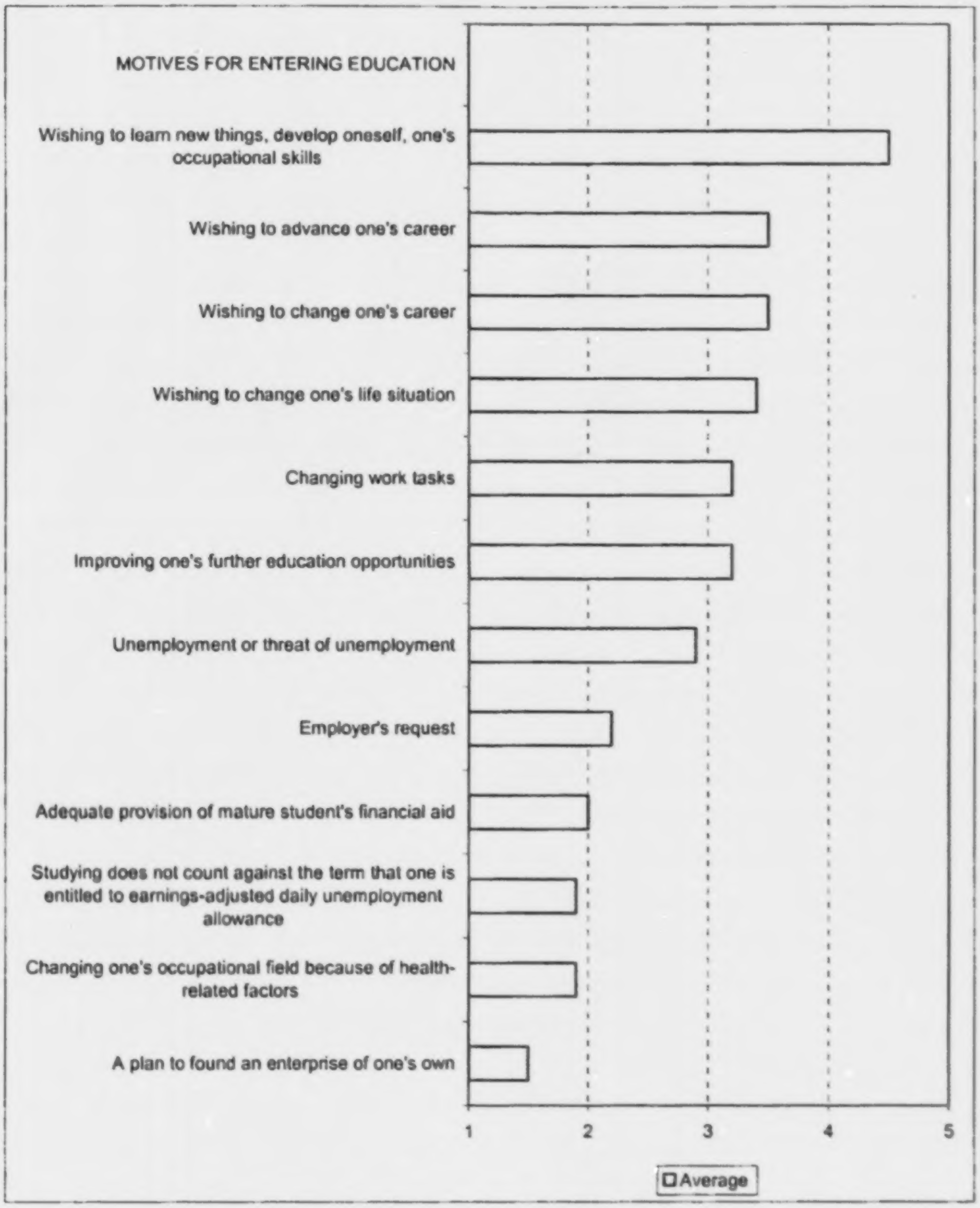

Figure 1. Motives for entering education among mature students over 40.

Factors connected with self-development or change stood out among motives for returning to education. They can be considered internal motives, and they were more prominent than external ones. A wish to learn new things, develop oneself and one's occupational skills emerged as the most popular factor in going into training. Changes in work tasks had made the informants personally aware of the rapid changes taking place in working life and the increasing obsolescence of their own current occupational competence. A wish to switch careers or advance one's present career were the second most frequently mentioned reasons. While short-term jobs are a given among the younger generation, some of the older generation work on short contracts either because of the economic situation in their field or because of their personal life situation. They were in education because they wanted to find a permanent job before retirement. According to the findings of the study, external motives such as factors related to unemployment or risk of unemployment and changing careers because of health reasons or having a plan to found an enterprise of one's own were mentioned less often than internal motives.

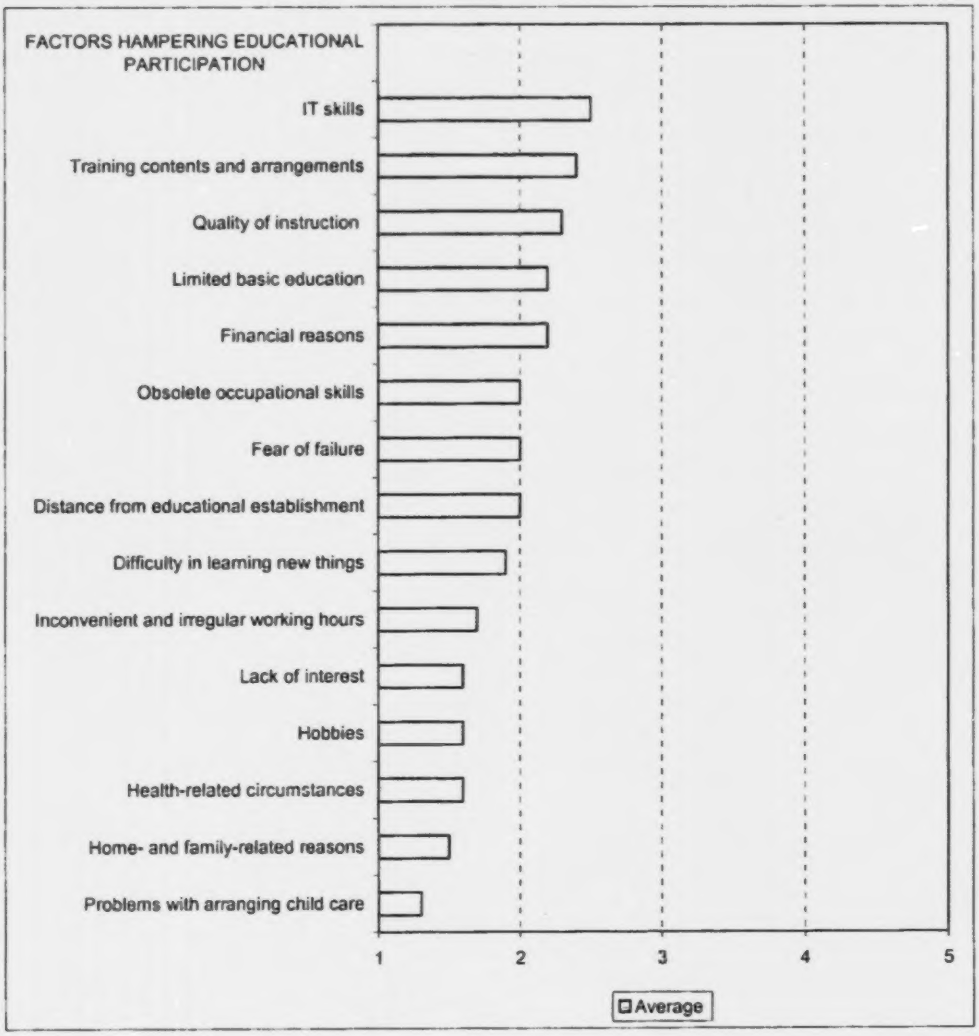

Figure 2. Factors hampering educational participation among mature students over 40.

A lack of IT competencies was perceived as the factor that most hampered the respondents' participation in education. An absence of IT skills among the aging is an example of how rapid changes in society and working life hinder aging people from entering education and finding work. Because the aging did not acquire these skills during their basic education, they must be developed in the context of work tasks and education. The biggest competence deficits are found among people with little education.

Other perceived obstacles to educational participation included training contents and arrangements and the quality of the teaching provision. In adult education, a single course is attended by people of different ages and with different levels of education, which in the students' opinion calls for differentiated instruction. A shortage of teachers stemming from cuts in the financial resources available to adult education centres was seen as a factor that is impairing the quality of the teaching provided, manifested as high turnover of teachers and as an increase in the proportion of independent studying.

The survey indicated that financial reasons head the list of obstacles hampering educational participation, underlining their importance. As regards the long-term unemployed, long distances to school and the resulting expenses might prevent them from entering education. Moreover, studying in another municipality was also a burden on family finances.

Manifestation of Adults' Educational Aspirations

With a view to condensing the information covering different aspects of educational aspiration, the individual questions were factored. The factors were used to form average variables that included all variables that, loaded on a factor, achieved the minimum value of .30.

The reliability of the average variables was tested using Cronbach's alpha, whose value approaches 1 in direct proportion to the reliability with which the variable is capable of condensing the information included in its component variables. Cronbach's alpha ranged between .50 and .83, which indicates a fair degree of success in constructing the average variables.

The average variables were further subjected to a cluster analysis, intended to reveal whether there were groups among the informants with different degrees of educational aspiration. The analysis yielded three groups, people with high, moderate and low educational aspiration. The groups can be named also on the basis of the classification of motivation used by Vallerand and others (Vallerand et al., 1992; 1993), as representing internal, external and weak educational aspirations.

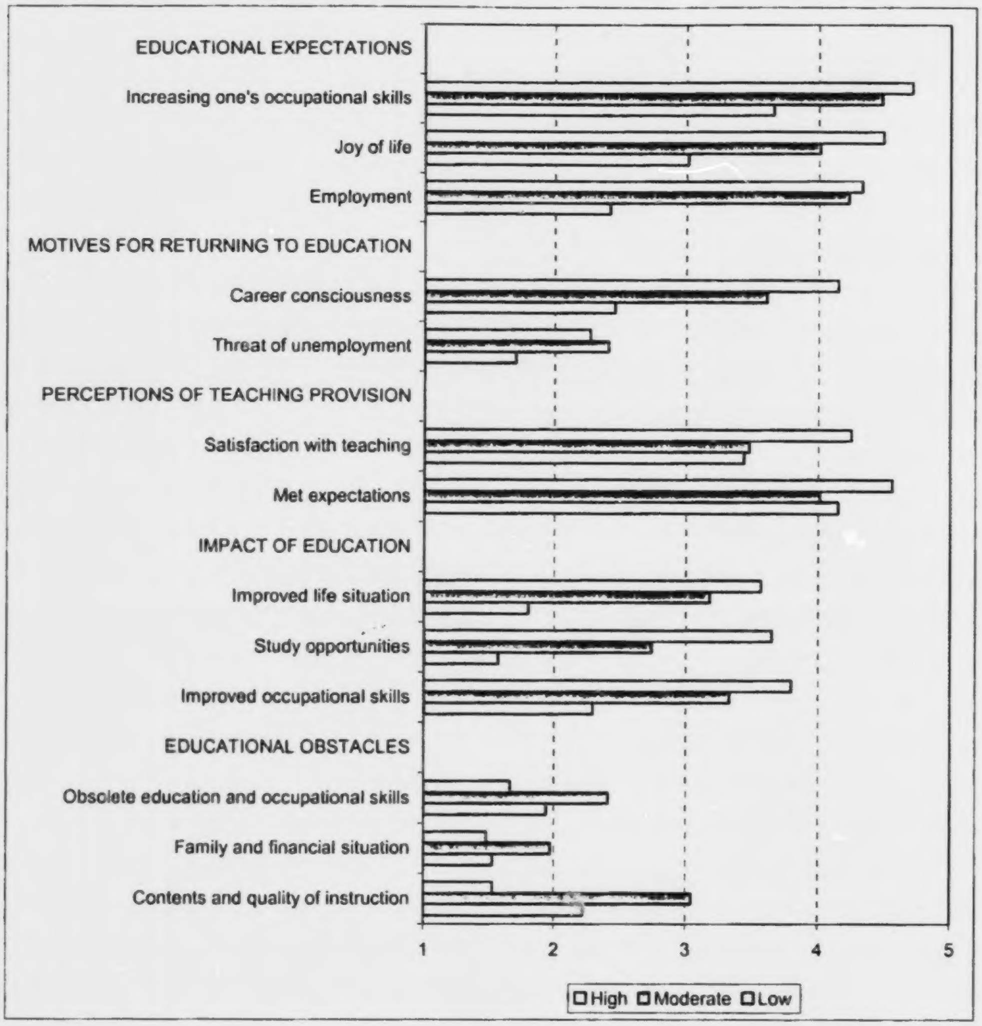

Figure 3. Educational aspiration: A grouping according to the results of cluster analysis.

In quantitative terms, the biggest group (45%) was that of people with moderate educational aspirations (externally motivated people). People with high educational aspirations or internal motivation were nearly as common (40%), with people with low educational aspirations forming the smallest group (15%). The greatest intergroup differences respecting various aspects of educational aspiration were found in this group, particular as regards educational expectations, motives, and perceptions of the impact of education, where answers belonging to the negative pole of the scale were more frequent than in the other groups.

Factors Promoting and Undermining Adults' Educational Aspirations and Motivation

First we shall consider the link between background factors and mature students with differing levels of educational aspiration.

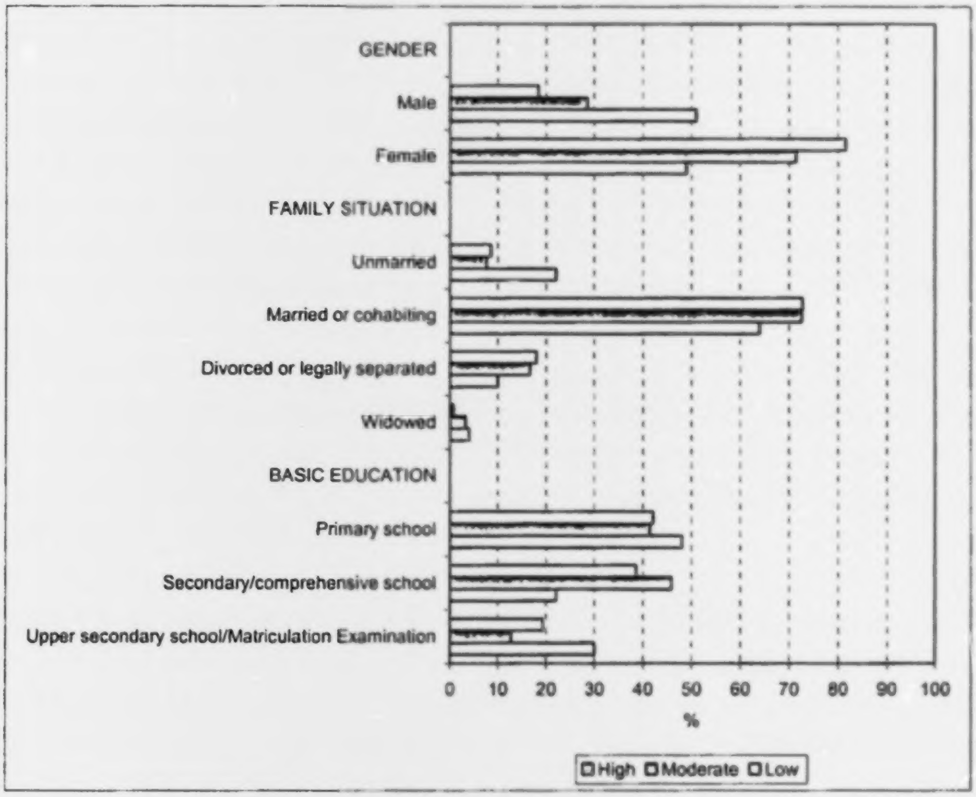

Figure 4. Educational aspiration according to structural factors.

There are statistically highly significant gender-specific differences in educational aspiration. This link between gender and educational aspiration is not a surprising result. It confirms earlier findings that women are educationally more strongly motivated than men. In a population where the proportion of men was 28 per cent, more than half of respondents with weak educational motivation were men. Accordingly, the link between gender and educational aspiration is reflected in female and male participation in adult education. The finding concerning family relations was similarly consistent with earlier research results. People with a family had higher educational aspirations than singles.

There was a statistically significant non-linear correlation between basic education and educational aspiration: both people who had only completed primary school and people who had finished upper secondary school were most common in the group of people with low educational aspirations. The groups with high and moderate educational aspirations included nearly equal numbers of people who had left education after primary school and people who had completed secondary/comprehensive education and the lowest number of people who had finished upper secondary school. A possible explanation for the overrepresentation of people with upper secondary education among respondents with low educational aspirations is that their competence deficit stems from personal factors rather than from inadequate basic education.

The students' average age was linked with educational aspiration in that the younger students were educationally better motivated than the older ones. Students over 40 considered that education would have a positive effect on their chances of finding a job, while students over 50 felt that education had ceased to play a role in their employment prospects.

Next we shall examine the relationship between independent and goal-directed action and educational aspiration. Of the respondents 63 per cent had returned to education on their own initiative, 37 per cent at the suggestion of other people. Those who had entered education on their own initiative were chiefly adult students with strong (46%) and moderate (43%) educational motivation. The educational motivation of those who had returned to education at other people's suggestion was in most cases moderate (49%). They included a greater number of mature students with strong (31%) and a smaller number of mature students with weak (20%) educational motivation than the other groups.

The link between educational aspiration and degree orientation approached statistical significance ($p<.05$). Students with strong educational motivation were studying for a degree more often than students in the other groups. Similarly, a willingness to consider further studies later on had a statistically highly significant correlation with educational aspiration. More than half the respondents with strong (internal) educational motivation and a fifth of those with weak educational motivation intended to return to education in the future.

A further link was found between educational aspiration and appreciation of IT competencies. The importance of IT skills was emphasised most by people with high educational aspirations, least by people with low educational aspirations.

Conclusion and Implications

This questionnaire survey examined educational aspirations among mature students over 40. It was found that they had gone back to education motivated both by particular aims and by instrumental considerations. Developing one's occupational skills was rated as the most important motivation for returning to education, while instrumental motivation was represented by a wish to avoid unemployment. While the respondents rarely considered that there were serious obstacles to entering education, a lack of IT skills was revealed as the greatest factor hampering educational participation.

The results made it possible to distinguish between three groups with distinct levels of educational aspiration: adults with high, moderate and low educational aspirations. They may also be characterised as groups displaying internal, external and weak motivation (cf. Vallerand et al., 1992). There were differences among the three groups related to gender, family situation, educational background, age, the degree of own initiative behind the decision to return to education, level of degree orientation, and appreciation of IT skills.

Students with low educational aspirations included more men, singles, people with primary-school education or people who had taken the Matriculation Examination than the other groups; their average age was 48 and they had in most cases pursued supervised studies or attended apprenticeship training. In addition, they had gone back to education at other people's suggestion. Their study aims did not include taking a degree and they did not plan to pursue further studies after the completion of their present educational programme. They did not consider IT competencies personally important. In fact, low appreciation of IT skills emerged as the most important predictor of low educational aspirations. A feature that attracted attention as regards the group of students with weak motivation was the distribution of levels of basic education among them. A probable explanation is that aging people's lacking educational aspirations are linked to a variety of background factors. Among people who have only completed primary school the causes behind a lack of aspiration are probably connected with inadequate learning skills, among people with completed upper secondary school education with personal reasons.

Respondents with high educational aspirations and motivation were in most cases family people, women, people with primary- or secondary-school education and aged 46, had attended vocational courses in adult education centres and had returned to education on their own initiative. Moreover, they studied with the aim of taking a degree and were willing to consider continuing their studies at a later date. Their positive attitude towards education was reflected also in that they saw acquiring and developing IT competencies as an asset. People with moderate educational aspirations are found somewhere between these two groups.

The present study confirms the fact that it is those most in need of education and training who are least motivated to go back to education, while those least in need of education and training are active students. In many cases, people with weak educational motivation have limited and obsolete occupational skills and training, with the result that their training needs will appear pressing from the perspective of the work community and society but not necessarily from that of the individuals themselves.

Given the demands of working life in today's society, this attitudinal disparity is a problem as regards the aging population. The cause is not aging alone but also the rapid rise in and expansion of educational levels in Finland, making the older generations less well educated than the younger ones. If people with weak educational motivation also neglect to acquire IT skills, they expose themselves to a risk of being excluded from the labour market.

In order to stay on the labour market one must maintain one's occupational skills, while demands for change compel adults into education. Adult education should open itself to working life because an aging unemployed person or an adult student under the threat of unemployment in particular wants education that will enable them to re-enter working life or retain their job. According to representatives of working life, the education and training provided would be more in keeping with the requirements of working life if more of it would be delivered at workplaces (Naumanen & Silvennoinen, 1996, 283–287).

More generally, in order to boost adult people's educational motivation we need knowledge that will help us to promote adult learning and develop teaching adjusted to the needs of adult learners. However, education and training for the aging is not only about pedagogical solutions. Instead, upgrading outdated education and obsolete occupational skills is a much wider social policy issue that requires also political measures.

When considering the findings it should be kept in mind that what we have here is a discretionary sample of over-40 adult people studying in adult education centres and undergoing apprenticeship training. In addition, the results are presented largely from the perspective of the individual, the mature student. Views of adult education among representatives of working life and teachers are beyond the scope of this survey. Nevertheless, it is important, in developing adult education, to pay attention to all parties involved in it.

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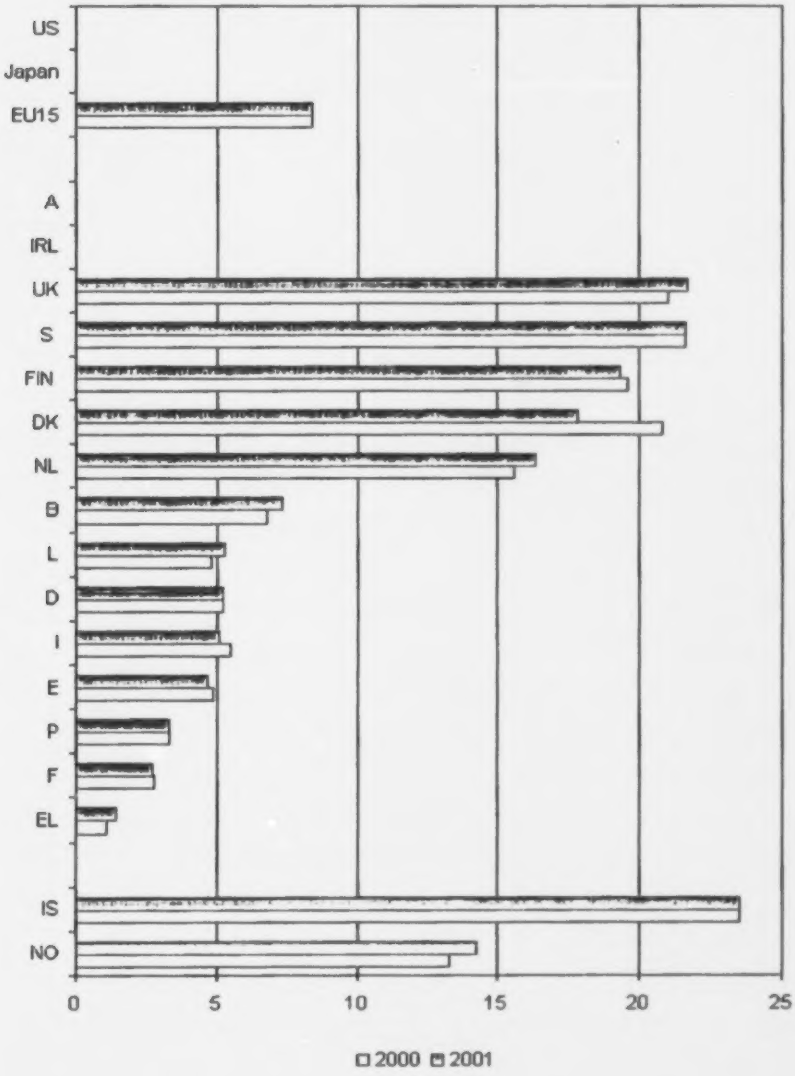
.Appendix *1*. Lifelong learning in 2000–2001: Adult participation in education and training.

Life-long learning (adult participation in education and training) in 2000-2001



Reference: Eurostat: Life-long learning (adult participation in education and training). 12 July, 2002.

MENTORING IN UNDERGRADUATE BUSINESS MANAGEMENT PROGRAMMES

Paper for ECER Conference 2002, University of Lisbon

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MENTORING IN UNDERGRADUATE BUSINESS MANAGEMENT PROGRAMMES

Abstract

This paper provides an overview of the role and contribution of mentoring in the context of an innovative degree programme, which involves undergraduate students spending the second and third year of their degree in-company. As well as describing the process within the context of the degree, the paper also examines the particular mentoring design features. One of these of specific interest is the shared mentoring role of academic members of staff and in-company managers. Each student therefore has an academic and work-based mentor. Another feature of interest is the variety of roles adopted by each of these mentors. These include, *coacher, facilitator, networker, counsellor.* In addition, the mentors share a role in assessing students work in relation to their skills development. The latter focuses on what are generally termed as transferable skills, namely; communication, teamworking, adaptability and leadership. Hence the mentoring relationship aims to provide assistance and encouragement to the student in three distinct areas; namely academic, professional and personal development.

This paper draws upon findings of primary research conducted with the mentoring teams that exist both within the wide range of consortium companies that sponsor the second and third years of the degree programme and Nottingham Business School (NBS). Additionally, the research includes the review of students on all 3 years of the BA (Hons) Business Management degree (BABM). The findings compare and contrast the perceptions of students, work-based and academic mentors in relation to the role and process of mentoring within the degree programme. The paper reports the perceived benefits of such a mentoring process for academic and practitioners working in partnership to support and enhance the students' learning experience.

Key Words

Mentoring, Undergraduate Programmes

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MENTORING IN UNDERGRADUATE BUSINESS MANAGEMENT PROGRAMMES

Introduction

This paper is concerned with the application of mentoring as a development process within undergraduate programmes in business and management. We have examined the case for more vocationally orientated first degree programmes elsewhere (Stewart & Knowles 2000 and Stewart & Knowles 2001) and so, for the purpose of this paper, we take the value of that emphasis as an accepted context factor. The programme which provides the focus of this paper is the BA (Hons) in Business Management (BABM) at Nottingham Business School (NBS). While this represents a singular and particular example, we believe that some general principles can be derived from the experience of mentors and mentees on that programme. Our purpose here therefore is to report that experience as a basis for identifying principles which may be of value to others considering utilising mentoring as a design feature of undergraduate programmes. More specifically, the paper is intended to achieve the following objectives.

- To provide an overview of the role and contribution of mentoring in the context of the BA (Hons) Business Management degree programme.
- To report the perceptions of the mentoring process from three different perspectives, namely; the academic mentors, the work-based mentors and the students (mentees).
- To compare our findings on both the role and process of mentoring with existing knowledge in this field.

The paper is structured into five parts in order to achieve these objectives. First, we provide brief details of the programme, with particular emphasis on the role and purpose of mentoring in its overall design. Second, a brief review of the literature on mentoring is provided. This does not claim to be comprehensive or exhaustive. The purpose is simply to identify some of the factors currently argued to affect the success or failure of mentoring in order to compare those with the main findings of our study. This will in turn affect the level of confidence that we and others can place on the generalisability of our findings. The third part of the main content describes and justifies our research design, while the fourth reports the findings of the study. We then go on to offer some interpretation of the findings through identifying some possible general principles on the use of mentoring in first degree programmes in business and management. The final part of the paper offers some general, though tentative, conclusions.

The BABM Degree Programme

The published papers cited in the introduction provide detailed descriptions of the NBS BABM programme, and so our overall description will be brief. The programme is designed and operated in partnership with a consortium of employers which includes household names such as Boots plc and Toyota (GB) plc as well as smaller and regional companies such as Frudd Building Services Ltd and Femcare Ltd. Students spend their first year at NBS being taught as a cohort and covering a similar Level One content as students on all undergraduate degrees in the School. At the end of the first year, students undergo a selection process conducted by the employers in order to gain a placement for the second and final years. They then become employees of their placement companies for those two years, and return to NBS twice each year for 3 week long study blocks. The study blocks are intensive study periods which cover a similar academic content as other degrees in the School. A schedule of the second and final year course structure is attached to this paper in Appendix 1. It will be clear from this brief description that the work placement is an integral part of the programme, and that it is intended to provide a significant component in the learning and development of students. Mentoring as a development process in the programme is intended to support and maximise the opportunities provided by that component.

Within the BABM programme, and for its specific purposes, mentoring is defined as follows.

> *Supporting individual development through promoting the notion of the independent learner, by guiding and encouraging the learning of mentees.*

Each student is allocated two mentors; the first is an academic member of staff in NBS and the second is a member of staff in the placement organisation. Each student keeps the same academic mentor throughout their final two years. The academic mentor is assigned to the student at the beginning of the second year. Practice with regard to work based mentors varies across employers. In some, the student again keeps the same person as a work-based mentor throughout their placement. In those cases, that person may be a HR practitioner or a senior line or operational manager. In other cases, the work-based mentor changes during the placement. Usually, this is related to students moving around the organisation; functionally and/or geographically; during their two years with the employer. The programme design does not specify a model that has to be adopted by employers. It does though specify the expected role and support to be provided by both academic and work-based mentors. In summary, these are as follows.

- ***Coaching*** - this involves the mentors helping and encouraging the student to understand both work and course related issues and helping them to develop their skills and capabilities.

- ***Facilitating*** - the student's mentors will be familiar with the aims and objectives of the course and will be in a position to help the student *'make things happen'*.

- ***Networking*** - the mentoring system will provide an important framework for communication within the course. In this context it will be the mentors' responsibility to support the students in developing their own network in addition to adding value through existing formal and informal channels of communication.

- ***Counselling and Supporting*** - mentors may be required to advise and support the student over a number of issues such as; stress management, motivation, work relationships, performance problems and moral support. Whilst mentors will not be qualified to provide all the advice required over some of these issues, they will normally be the first point of contact and should advise the student of professional counselling services if it is thought necessary.

- ***Assessing*** – both mentors will be required to assess and grade skills development reports and plans that are produced at the end of each in-company work period. Furthermore, mentors will be expected to provide both written and verbal feedback on the reports.

A major focus for the mentoring process within the programme is the skills development component. Students are required to produce a skills development plan, based on a self-assessment, for each of the four work placement periods, i.e. the periods following the end of the first year and those following each of the four study blocks in the second and third years. Each of the work periods have a specified skills theme. Hence, four themes run through the duration of the programme, namely *Communication Skills* (work period 1), *Teamworking Skills* (work period 2), *Adaptability Skills* (work period 3) and finally *Leadership Skills* (work period 4). The skills development plan is discussed by the student in a joint meeting with both mentors who have to agree it before implementation during the placement period. Following implementation, the student produces a skills development report. This is independently assessed and graded by the two mentors, who then meet to agree a mark. A further joint meeting is then held with the student where verbal and written feedback is provided by both mentors.

Face-to-face contact and both formal and informal meetings between students and their work-based mentors are, in general, continuous throughout each of the work placements. Similar contact with academic mentors is limited to their visits to employers to hold the meetings concerned with skills development, and to meetings which can be held during the study blocks at the School. However, telephone calls and emails are used to varying degrees to maintain contact during work placements. While practice can and does vary, in general such contact is the responsibility of the student to initiate as and when required.

Mentor training is also available in the programme. Academic mentors were provided with 9 hours training prior to launch of the programme with the first cohort in 1998. Since then, ad-hoc academic mentor review meetings have been arranged to discuss practice and experience. Work-based mentors are offered briefing sessions which are provided by the NBS co-ordinator, who is one of the present authors. Whether this offer is taken, and the length of the session, is determined by each individual company in the consortium. They also determine whether or not work-based mentors meet as a group to share experience and practice. All mentors are provided with a manual to support and guide their practice. The manual was produced by the NBS co-ordinator and agreed by the employers. A copy of its content page is provided as Appendix 2 to this paper.

This brief description of the empirical context shows that the mentoring process has a very specific and essential focus in the BABM programme. This is the skills development of students during their work placement, which as a component was included in response to the consortium companies who were involved in the initial design and validation of the programme. The description also illustrates that the process has some unusual features. First, there is the joint mentoring provided by academic and work-based mentors. Second, for some students the person performing the latter role will change. Third, the element of assessment and the role of mentors as markers is unusual in mentoring programmes (see Megginson and Clutterbuck, 1995). Finally, the geographic distance between academic mentors and mentees in most, but not all, cases is a factor which is not usually true of mentoring programmes. We will now move on to a brief examination of some of the academic literature to identify additional points of interest.

Mentoring – The Theoretical Context

The BABM programme in general and its mentoring process in particular can be seen as a response to a growing recognition of the importance of work-based learning (see CIPD 2000, Raelin, 2000). Research by Billett (2000) for example clearly shows the value and importance of learning at and through work, and the significant role in that learning that can be performed by mentoring processes. However, Billett's work , and that by Sambrook (2001) also shows that work-based learning cannot be assumed or taken for granted since its effectiveness is influenced by a wide range of factors. In the case of mentoring, these factors will include the degree of formality in the mentoring process

(Megginson, 2000), the attitude and abilities of mentors and mentees (Sullivan, 2000), the context of the mentoring process (Kleinman et al 2001) and, perhaps (see Ragins 1999) the quantity and quality of training received by mentors (Gregson 1994). However, it seems to be the case at the moment that while these factors are generally recognised as being significant, little is known or understood about their actual effects and, therefore, what if any principles should be followed in the design of mentoring processes (Megginson, 2000).

Part of the reason for this ambiguity in understanding the role and impact of influencing factors may be the lack of agreement on what mentoring is and is not (Clutterbuck and Megginson, 1999). Megginson (2000) questions the possibility and value of arriving at definitive understandings of the concept, though he does support the need to differentiate the term from others such as counselling and coaching. For Gregson (1994) mentoring clearly emerged from the tradition of counselling and its growth in employment contexts and applications. He also suggests that changes in education, and in particular a growing emphasis on 'practical' and work-based assessment are a major reason for the growth of mentoring as a development process. Gregson's argument on this last point certainly concurs with the rationale for the BABM degree and its mentoring component. He uses his analysis to support the following definition of mentoring.

> *'Mentoring is an attempt to transfer experience and expertise from experienced individuals in an organisation to the less experienced. It is often used as a king of '"fast-track" support scheme where one (relatively) senior manager oversees the activity and performance of a more junior colleague who is earmarked for rapid progression".* (Gregson, 1994:26)

This definition suggests many of the features traditionally associated with mentoring, though it does reflect the career orientation which Clutterbuck and Megginson (1999) argue is associated more with American conceptions of mentoring than those adopted in Europe. Stephen Billett (2000) adopts a view of mentoring based on the work of Rogoff (1995, see Billett 2000), as 'guided learning'. While this resonates with the first part of Gregson's definition, and with the European conceptions suggested by Clutterbuck and Megginson, it is not particularly helpful in meeting Megginson's (2000) call for differentiating different sets of practices. 'Guided learning' could be applied for example to coaching and instructing. Sullivan (2000), in common with Megginson, recognises the difficulties and problems inherent in defining mentoring. Within that context, Sullivan suggests the purpose of mentoring is as follows.

> *'The role of (mentoring) is to enable the (mentee) to reflect on actions and, perhaps, to modify future actions as a result; it is about enabling behavioural and attitudinal change.'* (Sullivan, 2000:163)

This definition can again be criticised on the grounds that it fails to differentiate mentoring since it could be applied to any form of development process. However, it does have merit in emphasising the ownership of learning and decision making as resting with the mentee, and in highlighting the importance of reflection in those processes. Both of these features are central to the conception of mentoring adopted in the BABM programme as described in the previous section.

Sullivan goes on to identify two primary functions served by the mentoring process. The first reflects the career orientation of US models and focuses on developing skills and knowledge, including political and social skills required to succeed in a given organisational context. The second is what is termed the 'psychosocial' function. Here, the focus is on '*a sense of competence, clarity of identity and effectiveness in a professional role'*. (Sullivan, 2000:169). Kleinman et al (2001) suggest three functions. The first of these they label 'vocational' which is, in essence, the same as the career orientated function suggested by Sullivan. The second is similarly the same as Sullivan and uses the same label of 'psychosocial'. The additional function identified by Kleinman and his colleagues is that of 'role modelling'. This simply refers to the mentor demonstrating expected attitudes and behaviours in the context of the particular profession and/or employing organisation. This last function obviously relies on a degree of regular and continuous interaction between mentor and mentee so that the behaviour of mentors can be observed by mentees. Sullivan also highlights the importance of such interaction based on his research, but for a different reason. This is what he describes as 'just-in-time' mentoring interventions which characterises the greater efficacy of mentoring which is available at significant or critical points in the ongoing experience and development of the mentee. Both 'role-modelling' and 'just-in-time' elements of the mentoring process would support the value of work-based mentors.

This feature of the process in the BABM programme is only one which we would suggest serves the functions identified by Sullivan and by Kleinman and his colleagues. Many of the design features described earlier are congruent with those functions. The findings of these two pieces of research are though of particular importance to the role of work-based mentors in the programme. Kleinmann et al (2001) found that role-modelling is significant in achieving learning outcomes on the part of mentees, especially outcomes associated with skills development. The point on role-modelling is supported by the work of Billett (2000) who reports that mentees in his study rated the value of coaching and role-modelling provided by mentors very highly. Immediate or early availability of mentors in response to critical incidents experienced by mentees was found by Sullivan to significantly influence the effectiveness of the mentoring process. Based on these studies therefore, it might be argued that the BABM programme is correct to utilise work-based as well as academic mentors.

Kleinman et al (2000) also identify the importance of organisational socialisation and personal learning as significant mediating factors in achieving positive or beneficial outcomes from mentoring relationships. The role of work-based mentors in achieving the former is an obvious potential benefit in the BABM design. The assessed element is of similar potential significance and benefit in the case of the latter. Personal learning is facilitated through the completion of skills development reports and the verbal and written feedback provided by both mentors. More importantly, since these occur at regular points throughout the life of the programme, the process is continuous and supports development of ability in managing, and thereby improving, learning skills and abilities. Students (mentees) become more proficient as learners managing their own learning and development. This is also facilitated and supported through the production and implementation of skills development plans which are negotiated and ageed with both mentors. This process has an added dimension and benefit which is examined in the next paragraph.

The work of Gerber (1998) supports both the need for and the value of what he calls 'self-education'. This refers to the fact that people learn outside work, and that some of that learning at least will be relevant and transferable to the work context. But, as Gerber argues, this will happen most efficiently and effectively if the individual consciously and deliberately manages their own learning process. The same is true also, according to Gerber, of learning which occurs through the experience of doing work. A similar point on the importance of learning which occurs outside of work is made by Sullivan (2000) who cites the work of Watson and Harris (1999) on the 'emergent manager'. Here, emphasis is placed on the *'whole life process of development'*. (Sullivan, 2000:162). Gerber (1998:170) makes a similar point in writing about the *'whole person'* and the *'worth of all the person's life experiences'*. Mentors in the BABM programme apply these notions by encouraging their mentees to look for informal learning opportunities both inside and outside of work when constructing their skills development plans. In doing so, they reflect the arguments presented by both Sullivan and Gerber that existence of a mentor can facilitate and support the development of self-managed learning.

A final point to raise in this section is the selection and allocation of mentors. Some writers; Megginson (2000), Gregson (1994) and Sullivan (2000) for example; suggest that certain qualities make for better mentors. In addition, there is an argued need to match mentors to mentees (Sullivan, 2000). There is an assumption in these arguments that the mentoring relationship established by mentors with their mentees will be a critical factor influencing the outcomes of the mentoring process. This assumption is clearly implicit in the BABM programme, although the selection and allocation of academic mentors is informal, and it is left entirely to the companies in the case of work-based mentors. However, the research conducted by Kleinman et al (2001) demonstrates that the characteristics of the mentoring relationship are not associated with the success or otherwise of personal learning in general or skills development in particular on the part of mentees. Given that the same work also shows that personal learning is a mediating factor in the effectiveness of the mentoring process, mentoring relationships are unlikely to affect that success. Hence, the lack of systematic selection and allocation of mentors and mentees in the BABM programme is unlikely to be significant in affecting its success. There is though another element to this question which is of interest. Development of mentors rather than mentees is a claimed benefit of the mentoring process (Sullivan, 2000; Gerber, 1998; Billett, 2000) and this is an implicit intention and feature of the BABM programme.

This brief examination of the literature suggests that the mentoring process in the BABM programme follows and applies many of the principles traditionally associated with mentoring processes. To the extent that these principles are associated with success in mentoring processes, it could be argued that mentoring within BABM can be expected to have been a success. Our research was intended to gather data which would provide a more substantial base for answering that question. We now turn to the research by describing its design.

The Study

Our research reflects the call made by Megginson (2000) for more systematic studies into mentoring. It also focuses on one of his 'big issues' which is the link between academia and practice, given the focus of an academic programme which utilises mentoring in an employment context. Megginson also raises interesting and serious questions on research methodology. We do not have space to address those questions in any detail, but we do accept his point that what we present here is 'our story' of the reported experiences of mentors and mentees in the BABM programme.

The research was designed to address the following objectives.

- To ascertain the perceived role of mentors from three different perspectives, namely; company (work-based) mentors, NBS (academic) mentors and students (mentees).
- To ascertain the perceived value of the mentoring process from the same three different perspectives.
- To ascertain the differences and/or similarities of the perceived role of the mentors.
- To ascertain the differences and/or similarities of the perceived value of the mentoring process.

The actual design has similarities to the studies conducted by for example Billett (2000) and Kleinman et al (2001), although it lacks the statistical sophistication of the latter. However, given our acceptance of the methodological position argued by Megginson (2000), that level of statistical analysis would be inappropriate. In summary, the research adopted the following procedure.

A questionnaire was produced for each of the three target populations, namely the students, academic mentors and work-based mentors. These were slightly different for each population and, in the case of the students, two versions were produced; one for first year students who had not yet experienced the mentoring process, and one for second and final year students. Questions were a mix of forced and open response, including the use of rating scales in some cases. Where questions used multiple choice design respondents were allowed to select more than one option. The questions were organised to focus on the role of mentors and the process of mentoring with a specific emphasis on the skills development component of the programme. The questionnaires were sent by post with return instructions and pre-paid envelopes.

Respondents were asked to reply within a three week period. The total population was surveyed in each case, with 60 students (Year 1 n=22, Year 2 n= 21, Year 3 n = 17) 28 work-based mentors and 9 academic mentors. The response rates for each group were:

Year 1 Students = 77% (n=17)
Year 2 Students = 66% (n=14)
Year 3 Students = 64% (n=11)
Work-based Mentors = 61% (n=17)
Academic Mentors = 78% (n=7)

Returned questionnaires were analysed using raw scores and simple percentages in order to produce single and cross tabulations within and across the three populations. Given the variation in population size, percentages were utilized in order to produce more meaningful comparisons. The qualitative data provided in response to open questions was grouped according to key themes identified in the initial analysis, rather than applying pre-determined categories. Some of the data was of interest only from the perspective of programme management and will not be reported within this paper. The key findings and interpretation of the relevant data are presented in the next section.

Findings and Interpretation

The findings and interpretation will be structured in the same manner in which the questionnaire was designed, beginning with the role of the mentor.

The Role of Mentors

Respondents were asked to indicate separately the perceived role of both the academic and work-based mentors. Summarised results are provided in figures 1 and 2 below.

Figure 1

The Perceived Role of Academic Mentor

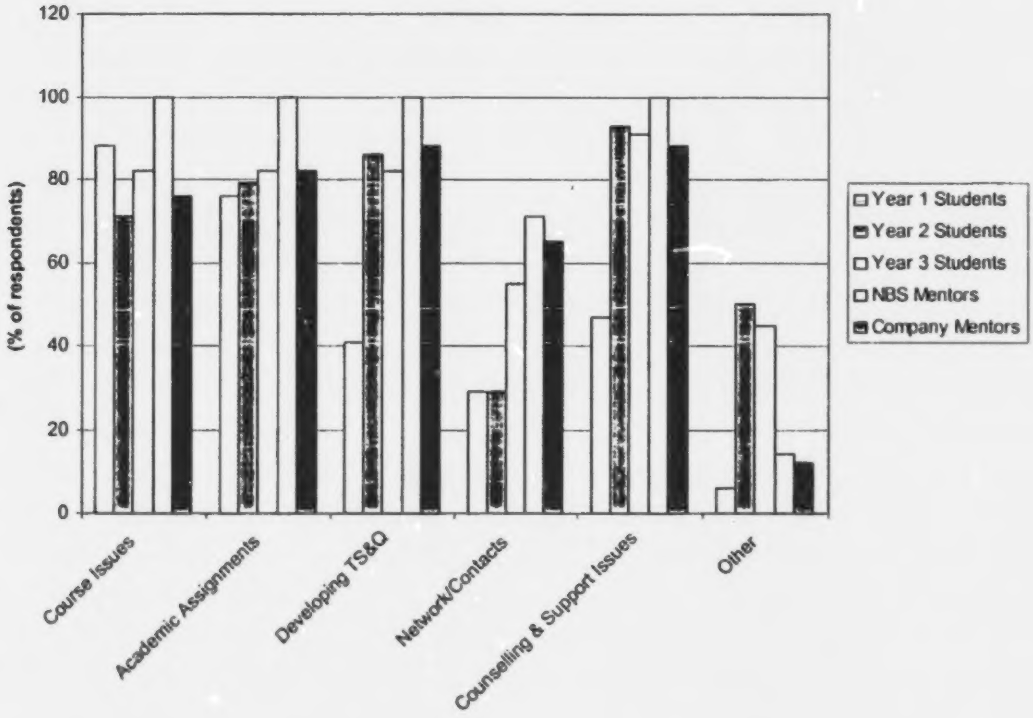
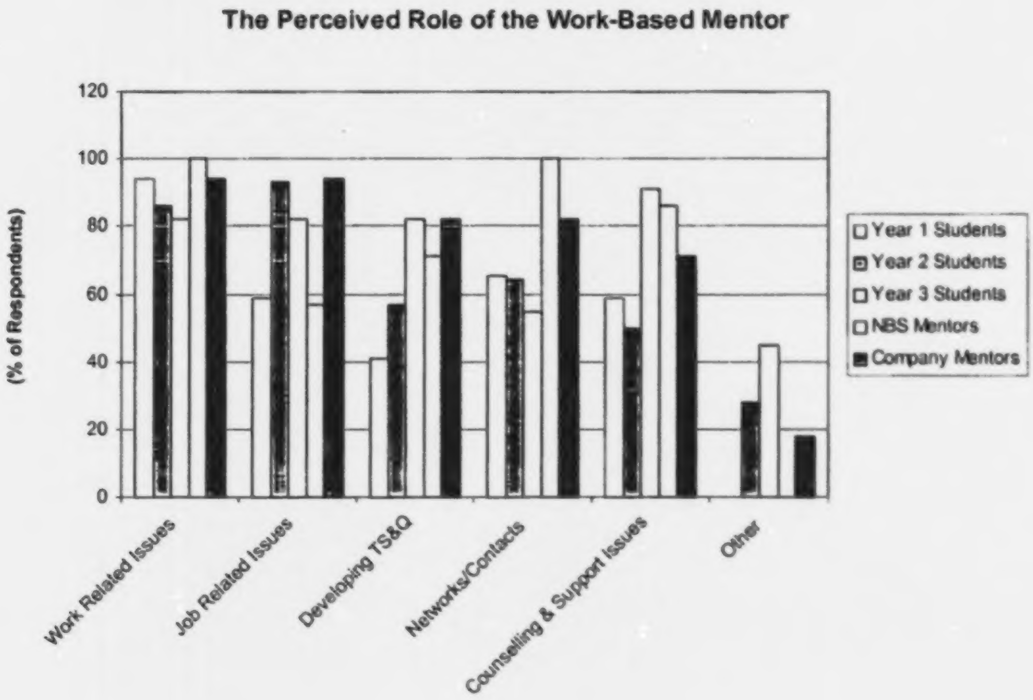


Figure 1 shows a high degree of agreement among all of the respondent groups across each of the possible roles. This result seems to confirm that in general the intended role meets the perceptions and expectations of all parties. One obvious exception is that of Year 1 student perceptions. They seem to have expectations of more emphasis on the academic programme compared with the alternative roles, as indicated by the responses to *course issues* and *academic assignments*. The academic mentors perceive themselves as fulfilling all of the roles with lesser emphasis on *networks and contacts*. One other item of some variation is the *other category*. However, responses from

Year 2 and 3 students predominantly expanded on their expectations around the work placement and no new or additional roles were suggested.

Figure 2



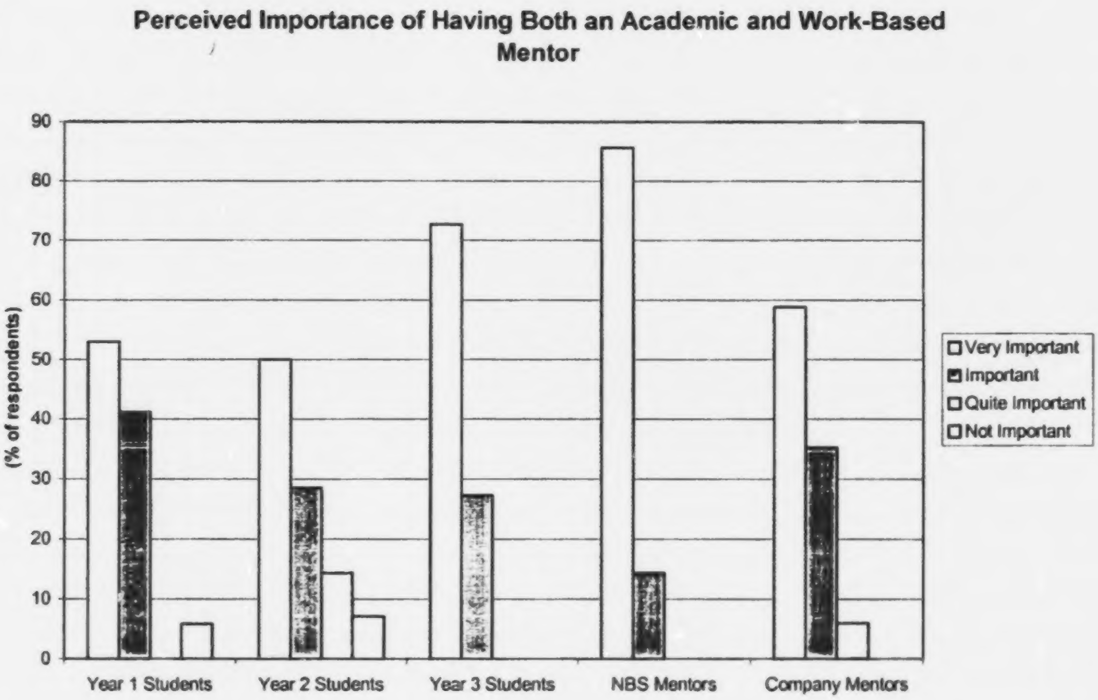
As in the case of the academic mentor results, the above results in Figure 2 seem to confirm that in general the intended role meets the perceptions and expectations of all parties. However, the work-based mentors themselves appear to give greater emphasis to general work and job related roles, as compared to the other categories. With the exception of work related issues, Year 1 student expectations are less aligned to other groups in relation to all categories, but in particular the role of *Developing Transferable Skills & Qualities* is notably lower than other groups. A final observation is that academic mentors consider work-based mentors to have a more significant role in the category *network and contacts* than themselves.

The Process of Mentoring

The first part of this section will report the perceived importance of the mentoring process. The results showed that apart from one Year 2 student all respondents perceived the process to be of some importance. An additional outcome was that both academic and work-based mentors attached more importance to the process than students in all years.

Respondents were asked to rate the importance of having both an academic and work-based mentor. Again, in general all respondents apart from one student in Year 1 and one in Year 2 perceived this to be of some importance. The academic mentors and Year 3 students rated the importance overall more highly than the other groups, as shown in Figure 3 overleaf.

Figure 3



Respondents were asked to indicate the extent to which they felt that developing an effective mentor/mentee relationship was important to the process. Figure 4 illustrates these results from a student (mentee) perspective in relation to both academic and work-based mentors, and Figure 5 shows these results from a mentor perspective in relation to the student (mentee). In the case of work-based mentors Year 3 students considered this to be of higher importance than Year 1 and Year 2 students. This concurred with the view of the work-based mentors. However, Year 1 and Year 2 students were in agreement that the relationship is of some importance. In the case of academic mentors, the student views were more variable but, with the exception on one Year 2 student, all attached some importance to developing an effective relationship. This result was in slight contrast to the academic mentors themselves who all rated an effective relationship as being very important.

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Figure 4

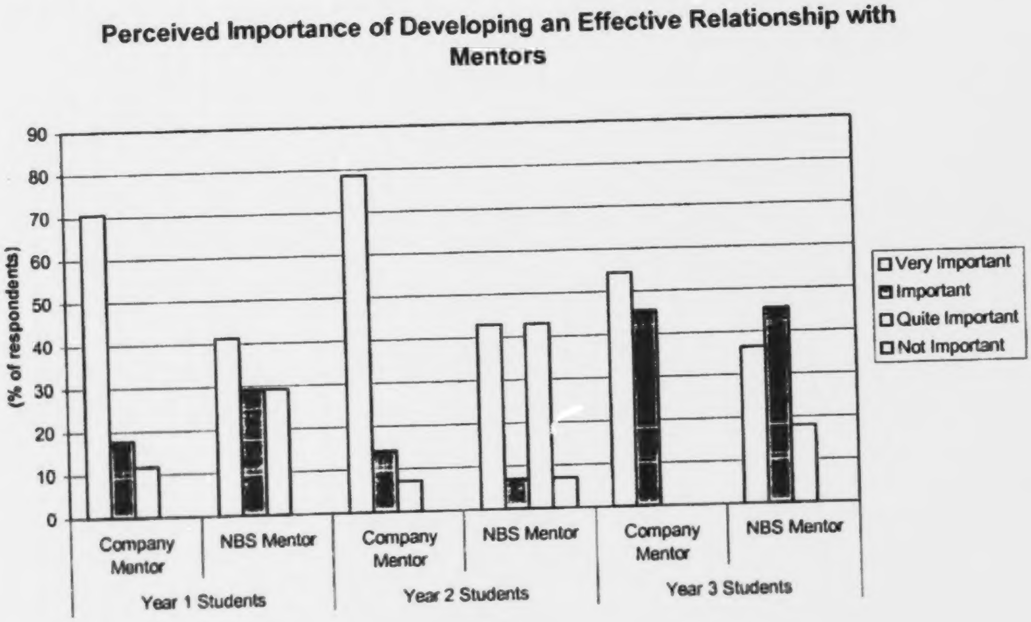
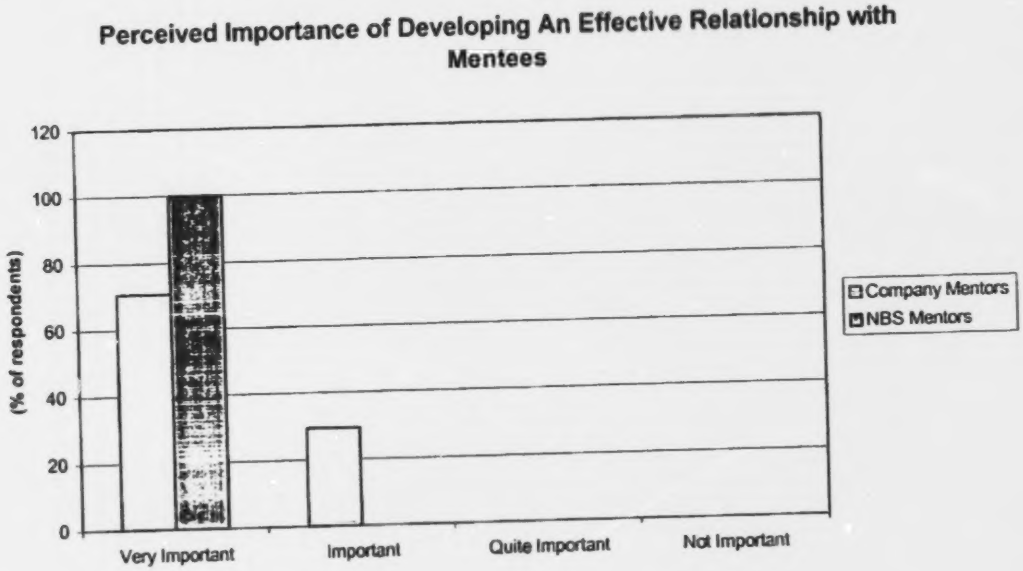

Perceived Importance of Developing an Effective Relationship with Mentors

Figure 5


Perceived Importance of Developing An Effective Relationship with Mentees

The Skills Development Component of the Mentoring Process

The final section of the questionnaire required respondents to indicate their feelings in relation to the marking and feedback provided for each of the four skills development reports that run through years 2 and 3 of the programme. As stated in the first section of this paper this activity forms the *assessing* role of both the academic and work-based mentors.

Figure 6

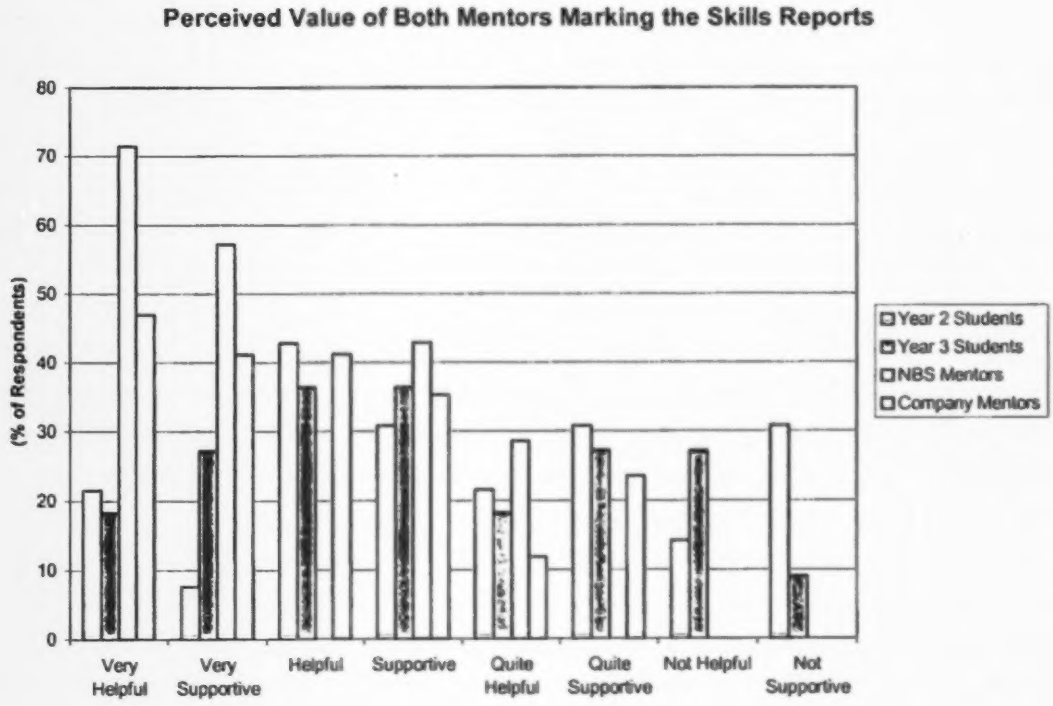
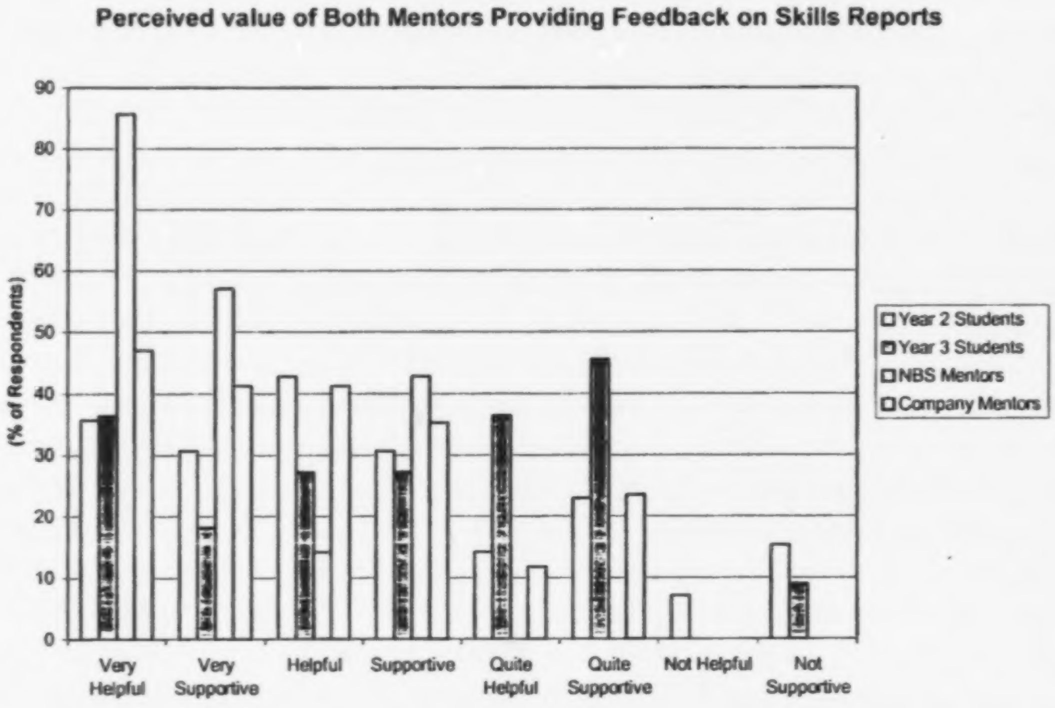


Figure 6 above indicates that there is a marked difference between mentors and students in respect of the perceived value of the marking activity. Notably 30% of Year 2 students did not perceive this to be supportive, but more Year 3 students than Year 2 students indicated that they did not find this activity helpful. Academic mentors view the dual marking approach to be more supportive and helpful than work-based mentors.

Figure 7 below summarises the perceptions of respondents in relation to the value of both mentors being involved in providing feedback on the skills development reports.

Figure 7



Students generally perceived the feedback to be supportive, however two Year 2 students and one Year 3 student did not consider feedback to be supportive. All of the

Year 3 students rated the feedback provided as being helpful. All of the academic mentors perceived this component of the mentoring process to be supportive. Once again, responses from academic mentors were higher than that of the work-based mentors both in terms of the process being helpful and supportive. Similarly, overall both mentor categories considered the feedback to be more supportive and helpful than students.

Interpretation

The findings of our research can be linked to the theoretical context discussed in the second part of this paper in a number of ways. Firstly, Kleinman et al (2001) found that psychosocial support is significant for achieving personal learning and skills development. When our findings on the perceived value of developing an 'effective relationship' are considered the students' (mentees) and mentors' views would seem to concur with this. One of the reasons why Year 3 students place greater importance on developing an effective relationship with both their work-based and academic mentors could be attributed to the fact that the intensity of both job and academic workloads increase significantly in the final year of the degree. Hence, it could be argued that an effective mentoring framework becomes more essential to help the student manage and cope with such increased responsibility, stress and pressure. All parties were asked to specify the most important attributes or factors that lead to an effective mentoring relationship. The most commonly cited responses from both students and mentors were *trust, openness, honesty, accessibility, approachability,* and *a clear/shared expectation of the mentor/mentee role.* This response may indicate the kind of qualities and attributes that need to be displayed by mentors if the process is to be successful. The last point on 'shared expectations' may also support the need for mentor training and, perhapds, for joint mentor/mentee training at the beginning of the programme.

Kleinman et al also argue that mentors should evaluate how much learning is occurring. Such evaluation is addressed in the BABM mentoring process via the skills development plans and reports, which involves both academic and work-based mentors marking and grading reflective learning assignments. A concern is the lack of value placed on such an activity by some of the students. The most commonly cited reasons given by students who indicated that they didn't feel the dual marking process to be either supportive or helpful were linked to concerns regarding the work-based mentors having no "academic training" or "academic marking background". Nevertheless there were a number of very positive reasons given by both Year 2 and 3 students as to why they felt having their skills reports marked by both mentors was both helpful and supportive, for example *"helpful to get company perspective of skills development", "opportunity to discuss development with both mentors", "opportunity to suggest helpful actions to mentees"* and *"demonstrates that both mentors are interested in student development"*. Indeed, the meetings conducted throughout the programme between mentors and mentees and the evaluation of the students' skills development can be used to determine whether the mentee is in need of more challenging work related assignments to facilitate future development. Moreover, there was commonality among respondents in relation to the one of the key roles of the mentor being to provide guidance and support on the students' development of transferable skills and qualities.

Sullivan (2000) found that a mentor with suitable skills, knowledge and experience, together with access to appropriate expertise elsewhere represents an effective support system. This concurs with the general view of both mentors and mentees that one of the key roles of academic and work-based mentors is to support the student in developing their own network of contacts both within the context of their studies and within the workplace. Similarly, students also cited "*knowledge of course*", "*a good understanding of the student's situation and needs*", "*related academic expertise*", and "*an NBS mentor whose experience relates to your company in some way*", as being some of the factors and attributes that they felt lead to an effective mentoring relationship. It could be argued that as the mentoring relationship between all parties develops over-time such knowledge, experience and expertise similarly develops and supports the claimed benefit of the mentoring process in relation to the development of mentors (Sullivan, 2000; Gerber, 1998; Billett, 2000). When such a benefit is acknowledged it could support the argument for a "mentoring model" within the BABM programme of students' retaining the same work-based mentoring over the duration of the two year in-company period.

Finally, Billett (2000) found in his research that physical separation of mentor and mentee was a limitation on the effectiveness of the process. Such a factor was not cited by any of the parties in relation to "distance" having a negative impact on the effectiveness of the mentoring relationship. This may be due to the fact that students have access to at least their work-based mentoring on a regular basis.

Summary and Conclusions

Our review of the literature suggests that the mentoring process within the BABM programme adopts sound principles which are likely to support the success of the process. The data collected from those involved in the process also support that argument, although the different parties involved in the process did give more or less emphasis to different principles. In summary, we would suggest that the following factors need to be considered when designing mentoring processes as part of undergraduate programmes in business and management.

Context and Focus

The mentoring process needs to be designed to meet the particular context of particular programmes. In the case of BABM, the significant role of the work-placement supports the need for work-based as well as academic mentors. In addition, we would suggest that having a specific focus for the process; such as the skills development component in the BABM example; also makes it more likely that the process will be judged or valuable and worthwhile by both mentors and mentees.

The Mentor-Mentee Relationship

Based on the results of our research, we would argue that there is little if any need to engage in systematic matching processes. That said, our results do support a need for mentors to display certain qualities and attributes. These may include familiarity with the work context. Attributes such as openness, honesty and approachability are though likely to be more important. Such attributes are probably more important in building an appropriate and effective relationship.

Degree of Formality

The BABM degree includes mentoring processes as part of its validated design. The focus on skills development is similarly a formal part of the programme. We do not have comparative data on non or less formal mentoring. However, our analysis of the literature and of the data we do have would suggest that the relatively high degree of formality in BABM works in favour of the mentoring process.

Mentoring Training

Again, we do not have comparative data on mentor training. It also needs to be recognised that mentor training is variable for work-based mentors in the BABM programme, and that we did not collect data on this topic in our survey. However, our impression is that success is likely to be affected by the level of understanding that both mentors and mentees have of the process and their respective roles. We would suggest therefore that training aimed at managing expectations on roles and contributions in the process is an absolute minimum. This is achieved in BABM through briefing sessions and the mentoring manual.

The Mentoring Process

Our final suggestion is that, the process should be continuous and ongoing. Some of the range of roles performed by mentors in the BABM degree require regular contact between mentors and mentees. Among these are those associated with psychosocial support and organisational socialisation, as well as the direct contributions of acting as coach and role model. These roles and contributions have been found to be significant in previous research, and were rated as important and valuable by our respondents.

Our overall conclusion is that mentoring can play an important and valuable role in developing the vocational value and orientation of undergraduate programmes in business and management. The factors discussed above suggest some useful principles to be adopted when designing mentoring processes as part of those programmes.

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Appendix 1

BA (Hons) Business Management - Years 2 & 3 (In-Company) - August 2002 - July 2004

AUG 02 (4)	SEPT 02 (4)	OCT 02 (4)	NOV 02 (4)	DEC 02 (4)	JAN 03 (5)	FEB 03 (4)	MAR 03 (4)
Student Induction to Company	Study Block 1 (3 Weeks) Business Contexts & Markets 27 Aug - 13 Sept	In-Company Period 21 Weeks 16 Sept 2002 – 7 Feb 2003				Study Block 2 (3 Weeks) Business Resource Mgmt. 10 Feb – 28 Feb	

APR 03 (4)	MAY 03 (4)	JUN 03 (4)	JUL 03 (5)	AUG 03 (5)	SEPT 03 (4)	OCT 03 (5)	NOV 03 (4)
In-Company Period 18 Weeks 3 Mar 2003 – 4 Jul 2003			Study Block 3 (3 Weeks) Systems & Orgn'l Design 7-25 Jul	In-Company Period 23 Weeks 28 July 2003 - 2 Jan 2004			

DEC 03 (4)	JAN 04 (4)	FEB 04 (4)	MAR 04 (5)	APR 04 (4)	MAY 04 (5)	JUN 04 (4)	JUL 04 (4)
	Study Block 4 (3 Weeks) Corp. Strategy & Orgn'l Change 5 – 23 Jan	In-Company Period 19 Weeks 26 Jan 2004 - 6 Jun 2004				End of Year Activity	Completion of In-Company Work and Graduation (5 Weeks)

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Appendix 2

BA (Hons) Business Management Degree

MENTORING GUIDE FOR STAFF

CONTENTS

Section No.	*Section Content*
1	What is mentoring?
2	What will my role as Mentor Involve?
3	- Staff/Student Expectations - When will I need to be available for the student? - Recording meeting issues and actions.
4	Student and Company Contact Details
5	BABM Programme for Years 2 and 3 (2000 – 2002)
6	Skills Development Assessment – *Communication Skills* – Study Block 1 Year 2
7	Skills Development Assessment – *Teamworking Skills* - Study Block 2 Year 2
8	Skills Development Assessment – *Adaptability* - Study Block 3 Year 3
9	Skills Development Assessment – *Leadership* – Study Block 4 Year 3
10	The Reflective Portfolio Part 1 (Year 2)

NETWORK ON VOCATIONAL EDUCATION AND TRAINING RESEARCH
University of Lisbon, 11-14 September 2002

The European perspective of HRD:
A debate on selected issues put forward by the EHRD Network

Integrating work and learning in organizations

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Abstract

This paper draws upon the Leonardo project DEVELOP (January 1997-December 1999) as well as several research projects on management development and work organization. The DEVELOP project, involving social partner organizations and research institutes from five member states, designed a CD-ROM containing a pilot version of a multi-media learning experience for managers to facilitate integrated learning and development in through the adoption of Learning Organization principles. The integrated development model has subsequently been developed further as a consulting tool and is being implemented in several organizations by The Andorra Group Limited.

The Learning Organization concept has its roots in several originally distinct traditions. Early writers on cybernetics (Beer 1959), organizational learning (Argyris 1962), systems theory (Miller and Rice 1967) and systems dynamics (Forrester 1961), clearly influenced the modern ideas of the learning organization. Argyris and Schön (1996: 181) suggest that socio-technical systems, as espoused by Emery and Trist (1960), also contributed to the notion of a learning organization with 'the idea of collective participation by teams of individuals, especially workers, in developing new patterns of work, career paths, and arrangements for combining family and work lives.'

The increasing interest in learning organizations from the 1980s is evident from publications in the organization theory (Argyris 1982; Argyris and Schön 1978; 1996; Levitt and March 1988) and management literature (Garratt 1987; De Geus 1988; Moingeon and Edmondson 1996). In the UK, learning organization principles were advanced most by the Learning Company project in Sheffield (Pedler *et al.* 1988; 1989a; 1989b; 1997), while at the European level, the EUROTECNET Technical Assistance Office promoted learning organization principles in its vision for HRD on behalf of the Task Force on Human Resources, Education, Training and Youth (Nyhan 1991; Stahl, Nyhan and D'Aloja 1993).

Dodgson (1993: 376) believes that the recent resurgence of interest in learning organization principles is attributable to the conjuncture of three factors. First, there is a general recognition that large organizations must become more adaptable and responsive to change, as evidenced in recent management writing (Kanter 1989; Wickens 1995; Morgan 1997). Second, technological developments behind process and product transformations (Piore and Sabel 1984; Kern and Schumann 1987; Womack *et al.* 1990) are having a profound impact on organizations, demanding faster learning (Hayes *et al.* 1988) to facilitate accelerated restructuring (Taplin and Winterton 1997). Third, the concept of learning has 'broad analytical value' as a dynamic, 'integrative concept that can unify various levels of analysis: individual, group, corporate, which is particularly helpful in reviewing the cooperative and community nature of organizations' (Dodgson 1993: 376). Senge's (1990a; 1990b) seminal work undoubtedly both reflected and stimulated this renewed interest in the learning organization, and has become as influential as the work of Argyris and Schön.

Despite the popularity of the concept of the learning organization, Raper *et al* (1997: 9) believe that there is no agreed definition that can be attached to the concept of the learning organization, claiming that discussions have been 'essentially aspirational and prescriptive'. Mabey (1994: 3) similarly regards Senge's view as essentially an optimistic one in assuming that 'individual employees will subscribe to a given organizational vision' and neglecting the 'incipient plurality of mass organizations'. Other critics have noted the paucity of concrete examples of learning organizations, but Dale (1992: 291) believes that attempts to identify best practice examples of learning organizations that could be replicated missed the point of the concept. While the learning organization may be an ideal to be approached and never completely attained, it is nevertheless possible from the now extensive literature to identify key principles recurrently associated with the concept and to point to some examples of organizations working towards the ideal.

Senge (1990a; 1990b) relates learning organization concepts to the adoption of systems thinking, team learning, shared vision, personal mastery and the use of mental models. Alexander (1987) identifies the contribution of MD to developing shared values. For Morgan (1997) the key to the learning organization is the power of metaphor in understanding processes inside organizations. Megginson and Pedler (1992) similarly emphasise the importance of vision and metaphor in their concept of the Learning Company. Pedler *et al* (1989) define a learning organization as one that 'facilitates the learning of all its members and continuously transforms itself'.

While some models and frameworks for building a learning organization have been proposed (Braham 1995; Brooks 1992; Pearn *et al* 1995; Marsick and Watkins 1996), the practical aspects of establishing the necessary conditions for continuous learning and development have been relatively neglected. This paucity formed the rationale for the Leonardo project DEVELOP, which had the objective of establishing a comprehensive framework for integrated learning and development in organizations, especially for raising competence at the intermediate skills level. Competence is used here in a holistic sense, to include both cognitive and functional *competences* and behavioural and meta-*competencies* (Winterton 2001a).

Management development

Management development provides a useful starting point for considering integrated learning and development because managers and related professionals, in accordance with the 'Matthias Principle' (to those that hath shall be given), typically enjoy a higher level of participation in learning at work than their subordinates (although there is some evidence to the contrary for senior managers and directors). Moreover, managers acquire their competences and competencies from a variety of sources, and it has become commonplace for management development to embrace a wide range of activities (Winterton and Winterton 1999). Given the need to expand the development of managerial skills (Johnson and Winterton 1999; Winterton *et al* 2000), this diversity of routes needs to be extended in order to promote greater access to, and opportunities for, learning, hence management development may contain some clues for good practice that can be generalised to other employees.

In two separate studies of management development in a range of organizations undertaken for the Department for Education and Employment (Winterton and Winterton 1996; 1997) and the Inland Revenue (Winterton and Winterton 2000), the cases demonstrating the most impressive improvements in business performance as a result of management development shared some of the characteristics of learning organization. Although, significantly, none of the respondents in the enterprises made any such claim to having established or even aspired to establish a learning organization, the practices identified, some of which are briefly reviewed below with other examples from the literature, demonstrate the potential for integrated learning and development at work.

Building cognitive competence

For managers to develop the necessary holistic understanding, a more intellectual and cognitive approach to management development was seen as necessary, especially for management development at the executive level. The MBA is likely to remain a primary development route for middle managers, but access must become more flexible and integrated with competence-based development and in the short term, this is unlikely to happen because of academic resistance. Company-specific Executive MBAs represent a move towards better integration with the workplace but there is scope for further 'embedding'. MBA material based on academic research is only likely to capture a small proportion of leading edge developments and important competencies like responding to uncertainty cannot be easily transferred via case studies. Senior managers will increasingly need to undergo more management development and updating, including self-development and 'thinking time' as well as training in mentoring and coaching. In addition to making more academic and analytical material accessible through a learning centre, organizations can establish programmes that involve 'guest lectures' addressing current developments based on leading edge research, along the lines of the Harvard and Stamford programmes.

Flexible, learner-centred provision

The current European policy emphasis on lifelong learning reflects the need to increase access to training and development and to ensure that training is delivered just in time, wherever people need it, using a variety of technologies (Slocum, McGill and Lei 1994). A tripartite partnership approach can maximise opportunities for learning and development, where the organization facilitates experiential learning for managers, individuals are encouraged to pursue self development and business schools, or other providers, offer facilities for education and qualification. Managers need to develop a range of personal qualities and competencies, so training and development must become more learner-centred, flexible and informal, comprising learning opportunities rather than formal programmes. Management training and development must involve more open and flexible learning on a cafeteria basis to cope with the pace of change. The focus should alter from training individuals to *facilitating learning by individuals, teams and organizations* (Watkins and Marsick 1992). Our study for the Inland Revenue concluded that a Learning Organization structure could be used to integrate otherwise disparate developmental opportunities, with the Standards acting as a unifying framework. This approach depends upon establishing a workplace environment conducive to learning, coupled with information, advice and guidance (see below).

Experiential learning

In the past, the acquisition of knowledge for *managers* has been largely a cognitive process, centred on education, and especially the MBA route, whereas for *manual employees* the process has always been more experiential and identified with training. While this distinction has been shown to be unhelpful, the result has been that *experiential (or tacit) knowledge* is often under-valued or unacknowledged, despite the fact that the effectiveness of experiential learning for managers is well established. Experiential learning should be increasingly adopted as a way of embedding management development in the workplace and providing more immediate access to real-life routes to the acquisition of relevant competences. As problem solving and decision making become increasingly important for managers at all levels, so team projects and special assignments become more appropriate vehicles for personal development. Learning activities should be focused on performance improvement and not just on building competence, again suggesting a need to focus management development on the work situation. Project-based action learning supported by coaching and mentoring (see below), is a particularly effective way of maximising the benefits of experiential learning.

Project-based action learning

Action learning (Henderson 1993) and company learning concepts (Pedler *et al* 1997) could be adopted, with groups of managers in project teams and task forces undergoing self-development through addressing real issues in the organization. As part of the *Next Steps* programme in the Inland Revenue, involving changes in work processes and de-layering of the management structure, two management development programmes were introduced (Smith and Dodds 1997: 189). The larger Senior Management Programme was delivered through self-managed learning and action learning groups tackling real work projects. Such project-based learning has considerable potential for linking development with organizational strategy, and the Management Standards offer a unifying competence framework in which to organise this.

Coaching and mentoring

Developing effective learning in the work environment requires intensive, hands-on support at the workplace. Increasingly, this will necessitate senior managers acting as mentors and specialists, including external consultants, acting as coaches for short-term, specific developments. Executive coaching involving external coaches was originally conceived as a means of improving the performance of a 'de-railed' manager (Koonce 1994), but because of its effectiveness as a developmental tool, it is now seen as both remedial and performance-enhancing for high-potential managers (Judge and Cowell 1997). As a result, coaching became an increasingly central part of executive development programmes in US companies during the 1990s, alongside mentoring, which involves internal coaches and may have a more long-term focus (MacLennan 1995; Kinlaw 1996).

Executive coaching is a highly cost-effective way of providing management development as a just-in time, bottom-line-driven, business activity geared to specific strategic objectives of the organization (Hall, Otazo and Hollenbeck 1999). Internal coaches are preferable where knowledge of the organization's culture is crucial and ready access is essential, while external coaches may offer a more impartial and, where remedial coaching is concerned, a more robust judgement. Whereas a coach may be subordinate to those being developed, a mentor is invariably senior and more experienced than the person being mentored (Gibb 1999). While coaching has become the norm in the US, formal mentoring is thought to be more common in the UK.

Workplace learning environment

The Taylor Report (Institute of Management 1994: 5) emphasised the need for organizations to create 'an environment where employees can develop and flourish and where change can be seen as a positive experience.' Learning Centres provide more flexible opportunities for workplace learning, extensively employing telematics and multi-media learning experiences, but effective learning is still largely dependent on social interaction. Buying a collection of CD-ROM learning packages in no way reduces the need for personal tutor support, advice and guidance. Some large companies have taken the concept further, establishing corporate universities, either in partnership with a business school or, increasingly, as an independent venture. The corporate university aims to combine the flexibility and relevance of work-based learning with the resources and status of traditional academic provision. The experiences of Motorola, McDonalds and, especially, West Group, demonstrate that the initial high investment provides a disproportionately greater return than conventional management development.

Information, advice and guidance

Information and guidance are crucial because awareness of alternative progression routes for management development is generally low and individuals tend to opt for those approaches with which they are already familiar (typically MBA, IoM or VQ). Since career progression *outside* the organization is often a major motivation for development, managers need access to independent, impartial advice and guidance in addition to the personal development planning that should reconcile the interests of the individual and the organization.

Work organization, learning and development

Such an approach to integrated learning and development is all very well for managers and others with a high degree of autonomy and significant learning skills, but what about the workers? The rediscovery of the importance of the 'people factor' became prevalent in management thinking during the 1990s, with an emphasis on the need to harness the skills and energies of the whole workforce and to develop motivation, commitment and leadership at all levels (Bennis 1999; Dessler 1999; O'Shaughnessy 1999). Since the pioneering work of Hackman and Oldham (1976; 1980), however, there have been few attempts to get behind the rhetoric that 'people are our greatest asset' (Sisson 1994: 7) and the cliché 'with every pair of hands a brain comes free' (Cannell 1993: 64), to explore how these can be translated into designing meaningful work that allows people to develop and to *use* their brains. Equally, in the arena of HRD and Lifelong Learning, despite widespread recognition of the need to raise the level of competence of all employees and the recognition of the importance of learning at work, little attention has been paid to the relationship between *work organization* and development. A preliminary investigation of this relationship was therefore undertaken through a study of HRD practice in four workplaces exhibiting different forms of work organization (Winterton 2000a; 2000b).

A typology of forms of work organization was developed in terms of task complexity, task variety, task discretion and management control. The way that work is organized and tasks assigned to individuals are major determinants of how individuals experience work. According to Hackman and Oldham (1976; 1980), provided the organizational environment is satisfactory (in terms of hygiene factors), individuals having a strong attachment to accomplishment and growth will be motivated to superior performance, experience higher job satisfaction and exhibit higher retention (lower absence and turnover) where work is designed around five core dimensions. When the five core dimensions (skill variety, task identity, task significance, autonomy and feedback) are fulfilled, individuals experience three psychological states (meaningfulness of work, responsibility for work outcomes and knowledge of results of work activities) that are associated with improvements in motivation, performance and QWL measures. Hackman and Oldham (1976; 1980) demonstrated how these core dimensions could be stimulated through a series of 'implementing concepts' (combining tasks, forming natural work units, establishing client relationships, vertical loading and opening feedback channels) and provided a job diagnostic survey to measure both the core dimensions and the critical psychological states.

Skill and autonomy are defining characteristics of the structure of work organization and the core dimensions that are most dependent upon HRD. In the Hackman and Oldham model, 'skill variety' conflates the variety of *tasks* undertaken with the range of *skills* deployed, while 'autonomy' is interpreted as the opportunity to decide how to do the work. These two concepts were revised with task variety and task complexity treated as dimensions of skill and task discretion and management control as dimensions of autonomy (Winterton 2000a). The extremes of the skill and autonomy typologies were characterised as Taylorist *v.* multi-skilled and monitored *v.* autonomous and by combining these two dimensions, four ideal-typical forms of work organization were distinguished, as in Figurer 1 below.

A Taylorist skill strategy combined with monitored control creates a form of work organization that still represents the prevailing mode of production in manufacturing industries, and appears to be replicated in some emerging industries, such as call centres. Individuals perform a narrow range of tasks requiring only shallow skills, their work is closely monitored and individuals have little task discretion. Such separation of conception and execution, where managers are supposed to do the thinking and operatives carry out their instructions, is the very antithesis of developing human resources. Since the purpose of such job design is to intensify the rate of production, such work organization is characterised as 'intensive'.

Figure 1 A typology of work organization

	control/discretion	
variety/complexity	monitored	autonomous
multi-skilled	holistic	anthropocentric
Taylorist	intensive	team work

The limitations of traditional work organization have long been recognised in Japan. For example, Konsuke Matsushita commented in 1979:

> We are going to win and the industrial West is going to lose out: there is nothing much you can do about it, because the reasons for your failure are within yourselves. Your firms are built on the Taylor model: even worse: so are your heads. With your bosses doing the thinking while the workers wield the screwdrivers, you're convinced deep down that this is the right way to run a business. For you, the essence of management is getting the ideas out of the heads of the bosses into the hands of labour. We are beyond the Taylor model: business, we know, is now so complex and difficult, the survival of firms so hazardous in an environment increasingly, unpredictably, competitive and fraught with danger, that their continued existence depends on the day-to-day mobilization of every ounce of intelligence. (Molander and Winterton 1994: 147).

These limitations became apparent later in the UK, and in recent years there have been signs of a departure from traditional 'intensive' work organization (Kelleher 1996), stimulated by discussion of 'new forms of work' (Piore and Sabel 1984; Kern and Schuman

1987). The most significant restructuring of work organization appears to have been underpinned by innovative vocational training arrangements based on social partnership between employers and trade unions (Winterton and Winterton 1994).

Several companies, especially in the chemicals sector, re-designed work in ways that demanded broader and deeper skills, such as diagnostic and analytical skills to trouble shoot and keep equipment running. To do this, workers need a conceptual understanding of the process that goes beyond a daily operational working knowledge, and a broader range of skills and competences. This approach is described as 'holistic', in contrast with the fragmented skills and knowledge associated with Taylorist work. Another solution has been to devolve a degree of decision-making and control to work groups, so that while tasks remain fragmented, the full range of operations is performed by a team, who need a broader range of skills and have more control over their pace of work. This approach, characterised as 'team working', has been especially prevalent in the clothing sector. Relatively few examples exist of companies that have combined extensive multi-skilling with autonomy, but *a priori* reasoning would suggest that this should provide the sort of work organization conducive to self-actualization and growth, according to motivation theories. Such work organization is therefore described as 'anthropocentric' or human-centred since it is assumed to be most suited to satisfying human needs.

Four UK workplaces that appeared to correspond with the four ideal-typical forms of work organization were studied to explore the extent to which needs and opportunities for HRD are affected by work organization, the relationship with job satisfaction and the separate effects of skill and autonomy. The workplaces were identified from information obtained in four earlier studies. The first involved an analysis of changing work relations in the coal industry as a result of new technology (Winterton 1985). The second explored the introduction of new forms of work organization in the clothing industry (Barlow and Winterton 1996). These two studies were part of long-running projects on industrial restructuring in the two sectors (Winterton and Winterton 1998; Taplin and Winterton 1996; 1997). The third study looked at trade union involvement in vocational training arrangements in six workplaces (Winterton and Winterton 1994), while the fourth examined the business benefits of competence-based management development in sixteen workplaces (Winterton and Winterton 1996). These last two studies were undertaken on behalf of the European Commission and the UK Employment Department, respectively.

From this earlier work, four workplaces were selected which appeared to correspond most closely with the four cells in the work organization typology in Figure 1:

- A coal mine in North Yorkshire where considerable job restructuring had taken place in order to promote functional flexibility and where there were daily struggles over work intensification (*intensive*).
- A clothing manufacturing plant in Staffordshire where team working had been introduced to raise job satisfaction and improve labour retention (*team work*).
- A chemicals plant in West Yorkshire where operatives had undergone training both to undertake more skilled tasks and to gain more conceptual understanding of the chemical processes (*holistic*).
- An aerospace company in Bedfordshire where quality control had been devolved to self-directed teams of operatives who had become multi-skilled (*anthropocentric*).

The results of the four case studies are reported elsewhere (Winterton 2000a; 2000b) and for present purposes it is sufficient to consider the cross-case analysis and conclusions. The case studies are exploratory and illustrative, so the conclusions that can be drawn are tentative. Considerable care was taken to select workplaces that closely matched the characteristics associated with the four ideal-typical forms of work organization outlined in the typology. Even so, there are limits to the generalization that is possible from a study based on a single case of each type and the conclusions are advanced with this caveat made explicit. Further empirical work is needed to explore whether these findings are replicated in other settings, especially in workplaces that represent intermediate cases between the four cells of the typology.

Work re-organization in the aerospace and chemicals cases necessitated and facilitated the acquisition of significant new competences, both lateral (mainly operational) and vertical (mainly conceptual). In the clothing case, both task complexity and task variety increased with the introduction of team work, the first demanding new conceptual skills and the second marginally requiring lateral skills. In the coal mining case, the emphasis was on task flexibility and the fuller utilisation of existing skills, rather than the acquisition of new skills. The aerospace and chemicals cases required substantial additional on-the-job training to equip individuals with the competences to cope with the demands of increased task variety and task complexity. Training in the clothing case was less extensive, while in coal there was no additional training, with the exception of those craft workers involved in maintaining the remote control and monitoring systems.

The four cases show significant variation in the extent of job satisfaction and the extent to which workers appear to share the benefits of new forms of work organization. The aerospace case showed the clearest linking of remuneration to the acquisition of new competences, although the additional remuneration was more significant in absolute terms in the chemicals case, and, in relative terms in the clothing case. All three cases also showed increased job satisfaction associated with greater autonomy. By contrast, in the coal case, there was no additional remuneration for accepting greater flexibility and no reported improvements in job satisfaction.

In these four cases, the effects of increasing skill and autonomy can be distinguished and it appears that raising skill demands has a greater impact upon job satisfaction than increasing autonomy, since the chemical workers appeared to have gained more from job restructuring than the clothing workers. However, increased autonomy did also lead to improved job satisfaction, as evidenced by reduced absence and turnover, and without doubt, the combination of multi-skilling and autonomous work, as in the aerospace case, had most impact on reported job satisfaction. Both multi-skilling and autonomy were also associated with HRD needs and opportunities, especially when combined.

The four cases can be considered to range along a continuum from coal, through clothing and chemicals, to aerospace. Autonomy and skills increase along this continuum, and with these so does the extent to which competence is developed and job satisfaction experienced. Further research is necessary to explore whether these findings are replicated and to assess the separate contributions of the component parts of the autonomy and skill dimensions. Such research will require the identification of workplaces with intermediate work organization characteristics as well as further ideal-typical cases for replication.

These preliminary findings are nonetheless relevant for the discussion of developing competence within an organizational context in three respects. First, they show that work organization has an effect on HRD initiatives and that the development of competence is both facilitated by, and necessitated by, forms of work organization that require greater skills and autonomy. Any departure from traditional 'intensive' work organization will demand more HRD and provide more opportunities for competence development, but the combination of multi-skilling and autonomy, 'anthropocentric' work organization, offers most opportunity for developing human potential. Second, these results confirm the association, long assumed, between HRD and job satisfaction: developing people at work enhances their experience of work and results in tangible benefits in reported satisfaction and behavioural indicators such as absence and turnover. Third, if anthropocentric work organization is the key to flexibility with security, then HRD practitioners will need increasingly to orient their efforts towards developing skills alongside autonomy and to enskilling an empowered workforce.

In raising questions concerning the conditions conducive to developing competence in the workplace, learning *through* work, as well as learning *at* work, this study perhaps offers further progress towards de-mystifying the concept of the 'learning organization'.

Integrated learning and development at work

DEVELOP: To build the conditions for a learning organization, learning must take place in a number of domains, representing different levels and different purposes, as shown in Figure 2. The starting point is learning at the individual level to meet the immediate business needs for basic occupational competence, represented by the bottom left building block in the figure. Building from this point, individual learning must be advanced to meet the organization's future needs which are known, through what Hendry *et al* (1995: 143-5) term extended occupational learning and learning from job context, to achieve extended occupational competence. Further learning of new occupational skills (Hendry *et al* 1995: 149) beyond the foreseeable needs of the organization leads the individual to what Senge (1990b: 142-3) describes as 'personal mastery', and represents progression towards the organization's future needs that are *unknown*.

Once individuals have achieved basic occupational competence, team learning can be developed to meet the immediate needs of the organization, drawing on the synergies of individual learning and focusing on developing team competence. The attainment of team competence to meet immediate needs and extended occupational competence of individual team members in line with future predicted needs, provides the foundations for developing team competences to meet the organization's predictable future needs. Action learning can provide a route to operationalise collective learning through the creation of new team routines in the same way that individual learning can precipitate organizational action (March and Olsen 1975). Team learning can progress to address areas that may constitute future unknown needs once individual team members are working towards personal mastery.

Finally, at the level of the organization as a whole, learning can be promoted between teams to meet immediate needs, provided the necessary foundations at team and individual level have been accomplished. It is futile to attempt to introduce a framework for a learning organization without establishing the foundations at the level of individuals and teams. Once these building blocks are in place and shared mental models emerge, the organizational culture is sufficiently altered to permit learning to be transferred upwards and outwards, while development increasingly focuses on the organization's future known needs. The broad trajectory proposed to build a learning organization involves progressively addressing the learning domains associated with higher levels and further needs of the organization.

An organization may be expected to pass through several stages of development in pursuit of these ideals of a Learning Organization, establishing new practices along the way. Jones and Hendry (1992) identify five stages: a foundation phase where the emphasis is on helping people learn how to learn; a formation phase where individuals initiate their own development; a continuation phase where individuals take responsibility for deciding their own learning activities; a transformational phase where at the levels of both the individual

Figure 2 Integrated Learning Domains© (The Andorra Group Limited)

needs levels	immediate	future known	unknown
organization	core competence	flexible response	learning organization
team	team building	anticipatory team learning	responsible autonomy
individual	basic competence	extended competence	personal mastery

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and the organization, the required skills and actions are reassessed; and, finally, a transfiguration phase in which learning becomes an ongoing process at all levels in response to changes in the external environment. The first three stages reflect progressively *enhanced individual learning* capabilities, while the last two stages reflect *organizational learning*. The ideal situation is reached where there is greatest reciprocity between individual and organizational development (Arthur and Kram 1989).

Stahl, Nyhan and D'Aloja (1993: 52) argue that the Learning Organization 'turns the strategy, structure and culture of the enterprise into a learning system. The transformation of the whole system is the goal of learning enterprises, and management development is transformed into a self-learning, self management process.' To achieve this transformation, the enterprise must implement the following changes:

- decentralization of decision-making, responsibilities and quality assurance;
- integration of functions at the workplace especially re-integration of 'brain and hand' in enlarged and enriched working fields;
- flattening of hierarchical structures, along with moderating, coaching and guidance roles for management;
- lateral networking instead of hierarchical control.

The learning company (Pedler *et al* 1991) is similarly characterised as adopting particular practices:

- a learning approach to strategy; participative policy formation;
- 'informating', a term used to describe internal dialogue facilitated by information technology;
- formative accounting and control providing feedback from which individuals can learn; exchanges of personnel between departments;
- systems to reward learning and sharing knowledge; enabling structures to facilitate learning;
- boundary workers who act as environmental scanners;
- benchmarking for development in line with best practice;
- a culture supportive of shared learning from experience;
- and processes supporting individual self-development.

These ideas can be incorporated within the framework for integrated learning and development produced in the DEVELOP project. If combined with the principles for management development and for anthropocentric work organization, it is possible to create a work environment that combines learning *at work* with learning *through work* for employees at all levels in the organization, including those with low skills at risk of social exclusion (Winterton 2001b). In the current policy context of Lifelong Learning (Winterton 2000c), the approach offers the possibility of combining workplace learning with broader learning and development in the community (Callaghan *et al* 2001), bringing the ambitions of the Lisbon summit in March 2000 to create a European economy on advanced skills and social inclusion closer to reality.

Nevertheless, it is probably best to regard the Learning Organization concept as an ideal state that is unattainable in so far as it addresses development to meet *unknown* future needs. Indeed, perhaps the power of the concept is in the development that accompanies the journey and the struggle in pursuit of the ideal. The test of the *utility* of the approach for business is the extent to which the adoption of integrated learning leads to improvements in business performance, while for individuals it is a question of employability and quality of working life.

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